

Partnerships to Reduce the Impacts from COVID-19 on the Water Sector Webinar Series

SPEAKER PROFILES

National Association of Clean Water Agencies

July 2020



J. Anthony Beard
Principal and Managing Member
Concentric Municipal Advisors
Atlanta, GA

Jim Beard is the Principal and Managing Member of Concentric Municipal Advisors an MSRB and SEC Registered Municipal Advisory Firm that provides strategic financial and management consulting services to corporations, governments, public-private partnerships and special districts. In this role, he works to provide sound solutions to management, economic, and financial challenges associated with the development and delivery of infrastructure services, including capital planning and debt issuance while addressing resource limitations, uncertain market dynamics, and competing demands for resources. Prior to forming Concentric, Mr. Beard most recently served as the Chief Financial Officer for the City of Atlanta, GA.

Mr. Beard has over 25 years of executive level experience in investment banking, public finance, financial advisory, treasury, and consulting services in the public and private sectors.

Mr. Beard has served as a guest columnist, public speaker, and panelist at numerous conferences and workshops, contributing new views and insights on finance related concepts and topics.

His previous service includes time as a board member of the Municipal Securities Rulemaking Board as well as a member of the Federal Communications Commission – Intergovernmental Advisory Committee.

Mr. Beard has completed the Advanced Management Program at Harvard Business School and earned his MBA from the J. L. Kellogg School of Management at Northwestern University. He attended the US Coast Guard Academy in New London, CT, and received dual Bachelor's Degrees with high honors in Finance and International Business from Florida International University.



Thomas Brzezinski
Chief Business Development Officer
Wade Trim
Taylor, MI

As Wade Trim's Chief Business Development Officer, **Tom Brzezinski** works closely with our clients and project managers to understand issues facing our clients and how we can best assist them in achieving their objectives. The COVID-19 environment has added a new dimension to this role. Since nearly 70% of Wade Trim's business is focused on Water Resources (water, wastewater, storm water and water reuse), Mr. Brzezinski is keenly aware of the issues impacting the water market sector and the application of emerging strategies and technologies to address those issues. His hands-on nature is a great asset.

Mr. Brzezinski has spent his 30-year career in the Water Resources sector starting in the field as a construction engineer before evolving into the design and project management roles. The first part of

his career was spent in MI before moving to Tampa 10 years ago; he understands the challenges in a variety of geographies. His special interest is in using design-build to provide better solutions for our clients.



Andrew Burnham
Vice President, Financial Services
Stantec
Tampa, FL

Andrew Burnham is the Vice President of Financial Services at Stantec. Mr. Burnham has 20 years of experience in personally conducting as well as overseeing the development of sustainable multi-year financial management plans and policies, alternative rate structures, as well as affordability analysis and assistance programs for a variety of utility systems. He has been recognized as an industry expert as part of providing testimony in utility rate-related regulatory proceedings in multiple states and territories (including FL, MI, AZ, and the United States Virgin Islands), as well as before the Federal Energy Regulatory Commission. He has led over 500 studies for 150+ communities, and has supported the issuance of \$1 billion of bonds for projects in the past 5 years.

Mr. Burnham is very active with several industry groups, and is a member of the National Association of Clean Water Agencies Utility Resource Management Committee, the Water Environment Federation Management Committee, and the American Water Works Association (AWWA) Rates & Charges as well as Financial, Accounting, and Management Controls Committees. He led the development of the Cash Reserve Policy Guidelines Report recently published by the AWWA and was recently appointed as a Trustee to AWWA's Management & Leadership Division.



Theodore Chapman
Municipal and Cooperative Utility Group
S&P Global Ratings
Dallas, TX

Ted Chapman is based in the Dallas office of S&P Global Ratings, serving as the public finance team's sector lead for US municipal utilities. He authored their water and wastewater utility rating criteria, which includes as explicit rating factors affordability, resilience and climate risk management. He also is part of the company's global Sustainable Finance team, helping to define how the credit markets view green bonds and environmental, social, and governance factors. He remains an active member of Water Environment Federation, American Water Works Association – including its Finance, Accounting & Management Controls and Climate Change committees – and the National Federation of Municipal Analysts. In his role at S&P he also collaborates with related organizations like the Governmental Accounting Standards Board, among others.

Mr. Chapman has been recognized multiple times by Smith's Research and Gratings as a "municipal all-star" Wall Street analyst. In 2017, then-Administrator Scott Pruitt named him to the Environmental Protection Agency's Environmental Financial Advisory Board, and in 2019 he was appointed to the federal Stormwater Task Force created as part of America's Water Infrastructure Act.



Debra Coy
Executive in Residence
XPV Water Partners
Clarksville, MD

Debra Coy is the Executive in Residence with XPV Water Partners, the largest water-focused growth equity fund in North America, with \$400 million in assets under management. She works with growth companies utilizing her experience as a top-ranked investment research analyst and strategic consultant to investors, companies, and municipal utilities.

Ms. Coy is well known in the water industry from her 20 years on Wall Street as an equity research analyst, where she developed a leading franchise and broad expertise in covering the global water markets for investors at firms including Janney Montgomery Scott, Schwab Capital Markets, HSBC Securities, and National Westminster Bank. She serves on the Board of Directors for AquaVenture

Holdings, Global Water Resources Inc., and Willdan Group Inc., and is a regular speaker and columnist on water industry finance and innovation.



Patrick Decker
Chief Executive Officer
Xylem, Inc.
Rye Brook, NY

Patrick Decker has served as President & Chief Executive Officer (CEO) of Xylem, Inc. since March 2014. From October 2012 to March 2014, he served as President & CEO of Harsco Corporation, a global industrial services company. Prior to joining Harsco, Mr. Decker served in a number of leadership roles for Tyco International's Flow Control business, ultimately serving as President of Tyco Flow Control, a leader in industrial flow control solutions.

Earlier in his career, Mr. Decker held a number of progressively responsible financial leadership positions at Bristol-Myers Squibb Company, including nine years of service in Latin America and Asia. He started his career as an auditor for Price Waterhouse LLP, now PricewaterhouseCoopers, LLP.

Mr. Decker serves on the advisory council for the Dean of the Kelley School of Business at Indiana University. He is a member of the Bipartisan Policy Center's Executive Council on Infrastructure and the Business Roundtable's Energy and Environment Committee.



Yvonne Forrest
Director
Houston Water
Houston, TX

As Director of Houston Water, **Yvonne Forrest** is responsible for the operation and maintenance of City of Houston's regional water and wastewater utility systems. She also oversees Regulatory Compliance, Infrastructure Planning and Operations/Program Support. Houston is the fourth largest city in the United States and City's public water and wastewater system is one of the largest utilities within the United States. She manages a staff of over 1700 with an annual capital and operations and maintenance budget of over \$657 million.

The Drinking Water Operations branch is responsible for three surface water purification plants, 100 groundwater pumping stations, over 7,000 miles of water mains, 59,000 fire hydrants and 159,000 valves. The Wastewater Operations branch is responsible for 39 waste treatment plants, over 370 lift stations, 127,000 manholes and 6,100 miles of gravity and force mains.

Prior to her career in public service, Ms. Forrest spent 15 years, as an Engineer, in the private sector developing processes to ensure compliance with environmental regulations, permits and corporate standards. She holds a Bachelor of Science in Chemical Engineering from University of South Carolina.



George Hawkins
President
Moonshoot LLC
Bethesda, MD

George Hawkins launched his leadership and innovation-focused consulting business Moonshot LLC after stepping down as Chief Executive Officer and General Manager of DC Water, where he served for eight years. Mr. Hawkins is also the Chair of Isle Inc, the US subsidiary of Isle Utilities, Inc.

During his tenure, he became well known across the water sector for transforming DC Water into an innovative, customer-driven enterprise, while tripling its investment in clean water. DC Water's innovations ranged from award winning Green Infrastructure and a \$500 million investment in clean energy, to creative social media campaigns and patents for new treatment technologies that require

less energy and chemicals but achieve better results. DC Water issued the nation's first century bond, world's first environmental impact bond, and spearheaded programs to support low income customers and provide meaningful job opportunities for District residents.

Mr. Hawkins retains an advisory role with DC Water and its non-profit Blue Drop spin-off, which markets products and services developed by the utility. He also serves on the National Infrastructure

Advisory Council, which provides advice to the White House on infrastructure policy. Mr. Hawkins is also on the

Board of Directors of the North American Electric Reliability Corporation, which ensures the reliability of the bulk electric grid.

He graduated Summa Cum Laude from Princeton University and Cum Laude from Harvard Law School and has taught environmental law and policy for the Princeton Environmental Institute since 1999.



Nadine Leslie
Chief Executive Officer
Suez
Paramus, NJ

Nadine Leslie previously served as Executive Vice President Health & Safety for the SUEZ Group and was responsible for employees and subcontractors use of proper safeguards while performing work activities. In this capacity, she was responsible for directing and providing Health & Safety oversight to all Business Units of the Group. She also led the development and implementation of behavior based safety practices, audited Health and Safety procedure implementation and compliance with corporate and regulatory requirements, and monitored the effectiveness of safety control measures used throughout SUEZ Business Units.

Ms. Leslie has more than 25 years of industry experience in operations, management, compliance, client relations and due diligence. Since joining the SUEZ North America team in 2000, she has held leadership positions of increasing responsibilities within the company's regulated, contract and corporate segments. She served as part of the management team at projects located in Atlanta, GA and Rahway, NJ in 2003, before being appointed vice president and general manager for the SUEZ North America Toms River division in 2006. She also headed the company's corporate internal audit department from 2009 until 2011 then served as President of SUEZ North America's Environmental Services from 2011 until 2016. In this capacity, she was responsible for overseeing the operations and management of contract operations throughout the United States and Canada. This includes over 80 projects affiliated with municipal and industrial water and wastewater systems as well as two solid waste treatment facilities.

Ms. Leslie holds a BS in Civil Engineering from the Faculté des Sciences in Haiti and completed an internship/scholarship program in urban planning at La Cambre University in Belgium.

**Michael Matichich**

Financial Service Community of Practice Lead
Jacobs
Arlington, VA

Mike Matichich leads the Financial Services consulting practice at Jacobs. He and his team support water, wastewater, and stormwater utilities in developing and implementing rate and financial strategies for their capital improvement programs and operating budget needs. Mr. Matichich has more than 30 years of experience in helping utilities address rate and financial issues. He is currently helping a number of clients consider a range of financing options, such as Water Infrastructure Finance and Innovation Act (WIFIA) loans and revisions to fee structures and affordability programs, as ways to mitigate the impact of the financial downturn that has resulted from the COVID-19 pandemic. He has helped clients qualify for WIFIA loans for more than \$1B in infrastructure improvements during the first three years of the WIFIA loan program.

Mr. Matichich leads the Affordability Subcommittee to American Water Works Association's (AWWA) Rates & Charges Committee, and has served as a lead author to several key industry guidance documents on affordability, financial planning, asset management and rate planning for AWWA, Water Environment Federation, and the National Association of Clean Water Agencies. He has served as Principal Investigator for a number of research projects for the Water Research Foundation on capital planning, financial planning, and asset management topics, and is a frequent presenter on these topics at national conferences and webinars.

Mr. Matichich has degrees from the University of Wisconsin (Urban & Regional Planning/Finance) and Ripon College.

**Eric Rothstein**

Principal
Galardi Rothstein Group
Chicago, IL

Eric Rothstein has over 30 years of experience in water, wastewater, and stormwater utility financial and strategic planning. His recent projects include supporting the City of Atlanta Watershed Management Department's capital financing program, and as co-author of the report: *"Developing a New Framework for Household Affordability and Financial Capability Assessment in the Water Sector"*.

Previously, Mr. Rothstein served on the MI Governor's Flint Water Advisory Task Force, and as program manager for establishment of the Great Lakes Water Authority. For the Detroit Water and Sewerage Department, he chaired the Blue Ribbon Panel on Affordability. He was Jefferson County, AL's rate consultant and municipal advisor for litigation related to the County's bankruptcy and issuance of \$1.7 billion in sewer warrants. He prepared the City of Atlanta's Financial Capability-Based Schedule Extension Report. For several permittees (Atlanta, Akron, East Bay Municipal Utility District, Honolulu,

Guam, Northeast Ohio Regional Sewer District, ST. Louis), he provided strategic and financial consulting and negotiation support services on financial capability assessment and low-income affordability issues.

Mr. Rothstein is a member of the US Environmental Protection Agency Environmental Finance Advisory Board, an MSRB registered Municipal Advisor, and a contributing author of the Water Environment Federation *Financing and Charges for Wastewater Systems* and American Water Works Association *Principles of Water Rates, Fees and Related Charges Manual of Practices*.



Kevin Shafer
Executive Director
Milwaukee Metropolitan Sewerage District
Milwaukee, WI

Kevin Shafer serves as Executive Director of the Milwaukee Metropolitan Sewerage District (MMSD). Since assuming this role, Mr. Shafer has transformed the MMSD into one of the leading wastewater utilities in the country through the integration of green infrastructure with traditional infrastructure. His 2035 Vision has propelled MMSD forward with climate change adaptation through an aggressive program to convert to renewable fuels, install green infrastructure, and preserve floodplains. Mr. Shafer's leadership has brought MMSD recognition as the recipient of almost every major award in the industry, including the 2012 US Water Prize.

Mr. Shafer has a Bachelor's Degree from the University of Illinois and a Master's Degree from the University of Texas. He served on numerous boards and is a past president of the National Association of Clean Water Agencies, past co-chair of the Water Research Foundation and the US Water Alliance, and a past member of the US Environmental Protection Agency's Local Government Advisory Committee.

Mr. Shafer currently serves on the boards of The Water Council, River Revitalization Foundation, Mequon Nature Preserve, and Great Lakes Protection Fund.



Beverley Stinson
Executive Vice President
AECOM
Crownsville, MD

Dr. Beverley Stinson is the Executive Vice President leading AECOM's Water business line in the Americas and serving as the global practice leader for Wastewater. Recognized globally for her wastewater expertise with an emphasis on applied research and innovation, her work focuses on developing cutting edge technologies and identifying novel solutions for addressing emerging issues like water reuse, energy neutrality, and PFAS. She has led numerous large municipal wastewater and biosolids master planning programs, and has conducted extensive research into biological nutrient removal processes, co-digestion, and

nutrient and energy recovery processes. Her projects have received numerous awards and have been documented widely in technical publications and presentations.



Steve Straus
President
Glumac
Portland, OR

Steve Straus is the President of Glumac, A Tetra Tech Company, a sustainability-focused building engineering and commissioning firm founded in 1971. Since 2000, he has grown the firm three-fold while holding true to its mission to design “Green Buildings that Work.” With sustainable design as its guide, Glumac has become a leader in the green building industry, having hundreds of LEED-certified projects in its portfolio, and is now helping lead the growing green building industry world-wide.

Since graduating from the University of California, Berkley with a degree in Mechanical Engineering, Mr. Straus has been passionate about environmental issues and design. Today, he is a mechanical engineer with a focus on sustainable design and carries a proven track record of actual energy costs below modeled estimates.

Since 2018, Glumac has been part of Tetra Tech’s High Performance Buildings Group. Along with leadership from Cosentini and Norman, Disney and Young, Mr. Straus leads a team of more than 2500 sustainable building designers that features one of the most skilled MEP engineering groups in the world.



Jeff Theerman
Former NACWA President 2010 - 2011
Vice President/Senior Utility Performance Consultant
Brown and Caldwell
St. Louis, MO

Jeff Theerman is Brown and Caldwell's National Utility Performance and Optimization Leader. In his role he leads a team of consultants that advise clients about how to create sustainable continuous improvement in their organizations. For seven years he has advised a variety of clients on strategic planning, asset management, operations & maintenance optimization, smart utility solutions, organizational redesign, business process improvement and change

management.

Mr. Theerman joined Brown and Caldwell after completing 28 years with the Metropolitan St. Louis Sewer District (MSD) serving as their Executive Director for the past nine years. The MSD serves the greater St. Louis area with a population of approximately 1.3 million people. He managed and supervised a 900-person staff with an annual operating budget of \$161.9 million. The District operates seven treatment plants, 6500 miles of wastewater collection system, 3000 miles of stormwater system and 286 pumping stations.

While at MSD, Mr. Theerman held a number of positions including management of the District’s largest wastewater treatment plant, management of the wastewater and stormwater collection system, and

Director of Operations with overall responsibility of the utilities infrastructure operations and maintenance.

While the Districts Executive Director he represented MSD on the National Association of Clean Water Agencies' Board for nine years and served as the Association President in 2010-11.



Leisa Thompson

NACWA Board Member

General Manager

Metropolitan Council Environmental Services

Saint Paul, MN

Leisa Thompson currently serves as the General Manager of Metropolitan Council Environmental Services where she has worked for most of her career. Previously she served as the laboratory services manager and the deputy general manager. Environmental Services provides wastewater services and water resource and water supply planning for a population of 2.7M living in the 110 communities that are within the Metropolitan Council planning authority.

Environmental Services serves approximately half of Minnesota's population with nine wastewater facilities and an annual capital budget of \$150M. The organization has a tradition of quality and cost competitiveness and a vision to support a sustainable regional water future through collaboration and effective planning.

She has served on the National Association of Clean Water Agencies board of directors since 2016 and serves as Chair of the Nominating Committee.

Ms. Thompson's education includes an MBA from St. Thomas University in St. Paul, MN and a BS in Medical Technology from Winona State University in Winona, MN.



Douglas Varner

Senior Vice President

CDM Smith

Fort Worth, TX



Paul Vogel
President
Greeley & Hansen, LLC
Chicago, IL

Paul Vogel is the President of Greeley and Hansen, a leading international civil, environmental, and water infrastructure consulting engineering firm headquartered in Chicago since 1914. With over 30 years of engineering and management experience, Mr. Vogel has been responsible for directing large water infrastructure projects and long-range water management programs for major cities and municipal utilities across the globe.

Mr. Vogel's vast experience as a project director runs the gamut of study, planning, design, and construction services for a wide range of complex water and wastewater infrastructure projects. His specific experience includes leading projects for water and wastewater treatment facilities, wastewater

and stormwater collection systems and pumping stations, water distribution storage facilities, combined sewer overflow studies, as well as solid waste management facilities.



Cindy Wallis-Lage
President, Water Business
Black & Veatch
Kansas City, MO

As President of Black & Veatch's Water Business, **Cindy Wallis-Lage** leads the company's efforts to address water infrastructure needs around the world. In this role, she leads a workforce of more than 2,800 professionals in more than 75 offices located on five continents.

A global champion for the world's water resources, Ms. Wallis-Lage advocates understanding water's true value and promoting its resilience so that communities may achieve their social, economic and environmental sustainability goals. She is a frequent speaker at many global industry forums and events developed to confront the world's most vexing water industry issues. She is currently on the Board of Directors for the US Water Alliance and serves on the Leadership Council for Water For People.

Ms. Wallis-Lage, who has been with Black & Veatch for 34 years, is also well known in the industry for her expertise and experience in the treatment and reuse of water and wastewater resources. She has been involved in more than 100 projects worldwide, helping public and private entities successfully, develop, enhance and manage their water, wastewater and stormwater facilities and infrastructure.

Ms. Wallis-Lage's leadership has earned her recognition in the industry and business communities. Among her recent awards are the *2018 Suzanne Jenniches Upward Mobility Award* from the Society of Women Engineers and frequent recognition among the Top 25 Global Water Leaders.