



## **PRESIDENTS COUNCIL**

**September 9, 2015**  
**10:00 a.m. – 3:00 p.m.**

**American Airlines Admirals Club**  
**Chicago O'Hare International Airport**

(Terminal 3, H/K Concourse between Gates H6 and K5, Upper Level, Conference Room H; Tel: 773-686-8353)

## **A G E N D A**

*10:00 – 10:15 a.m.*      **Introductions / Meeting Objectives**

*10:15 a.m. – 3:00 p.m.*   **Open Discussion of Topics** [*lunch will be served at 12:00 pm*]

➤ **WWEMA Annual Conference Update**

➤ **Business Environment**

- Health care/employee costs
- Skilled workforce constraints – finding/retaining/succession planning
  - Municipal markets
  - Emerging markets
  - International markets – payroll/benefits for non-U.S. citizens abroad
- Sales channels – Reps
  - Development
  - Capabilities – municipal and industrial
- M&A activities and trends
- Supply chain issues
- Role of manufacturers in driving solutions/innovation
- Changes at AWWA and WEF and impacts on the future

➤ **Economic Outlook**

- Projections 2016-2020 – most useful market forecasts/indicators
- Project delays / lag – zero sense of urgency on municipal projects
- Bidding behavior – more bidders/drop dead pricing
- W/WW Funding – near and long-term / health of customers
  - SRFs, Private Activity Bonds, Alternative Funding
- Costs and key commodities – scarcity, affects of American Iron and Steel (AIS) provisions
- Impact due to oil production slow down
- Legislative and Regulatory:
  - Legislative drivers
  - State/Federal regulations and enforcement (i.e. total nitrogen effluent limits)
  - Continuing Resolution
- Election 2016

➤ **Domestic Markets**

- Municipal
  - Design work backlog
  - Project vs. discretionary
  - Project financing and funding availability:

- Non-regulatory drivers: droughts and floods, algal blooms, premise plumbing - *Legionella*
- Industrial
  - Water reuse – indirect and direct potable
  - Commercial and industrial trends

➤ **Global Economics**

- Impacts of US\$ on sales/competitiveness/exports
- Impacts of international currency devaluations
- Stock market correction impacts
- Impacts on lack of Ex-Im Bank authorization
- International Economic Indicators

➤ **International Markets**

- Relative strength of international segments
  - Asia Pacific
  - Europe
  - Latin America
  - Middle East and Africa
- Growth prospects