AGENDA

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
    o Municipal markets
    o Emerging markets
    o International markets – payroll/benefits for non-U.S. citizens abroad
  • Sales channels – Reps
    o Development
    o 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
    o 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:
    o Legislative drivers
    o State/Federal regulations and enforcement (i.e. total nitrogen effluent limits)
    o Continuing Resolution
  • Election 2016

➤ Domestic Markets
  • Municipal
    o Design work backlog
    o Project vs. discretionary
    o 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