

# Virginia's

# Utility Management Conference

Wednesday, May 6, 2020  
Richmond, Virginia

9:00 AM – 10:00 AM

Registration and Continental Breakfast

10:00 AM – 10:15 AM

**Welcome** Paul Delphos and Christene Mitchell, Utility Management Committee Chair and Vice Chair

10:15 AM – 11:45 AM **Asset Management**

**Keys to a Successful Asset Management Program**

Anas Malkawi, HRSD; Alton Elchols, Loudoun Water;  
Nina Andgren, UOSA

**Closing the Gap Between Asset Management and O&M Through Application of Data Analytics Solutions** Prabhu Chandrasekeran, Stantec

10:15 AM – 11:45 AM **Financial Management**

**Rate Setting and Stakeholder Engagement**

Robbie Cornett, Washington County Service Authority;  
Bart Kreps, Raftelis

**A Different Look at Financial Wellness**  
Melissa Josey-White, HRSD

**Networking Lunch (11:45 AM – 12:30 PM)**

12:30 PM – 1:30 PM **Utility Managers Panel**

**Controversial Statements**

Ted Henifin, HRSD; Karen Pallansch, AlexRenew; Jackie Jarrell, Charlotte Water and WEF President;  
Roddy Mowe, Loudoun Water; Calvin Farr, City of Richmond

**Networking Break**

1:45 PM – 3:15 PM **CIP Management**

**Aim Small to Hit Small - Improving the Accuracy of CIP Reporting** Thom Lipinski, Loudoun Water

**Prioritizing Your CIP** Brandon Pfleckl, Prince William County Service Authority; Chengyan Zhang, Stantec

**Owner and Contractor Perspectives on Scheduling**  
Laurel Xiao, Fairfax County; Sandy-Kae Gray, Stantec;  
Mike Hundley, Black & Veatch

1:45 PM – 3:15 PM **Workforce Management**

**Generational Differences: Real or Imagined?**

Dave Francis, Dewberry

**Successful High School Apprenticeship Program**  
Neil Norris and Mike Altizer, Western Virginia Water Authority

**Networking Break**

3:30 PM – 5:00 PM **Collaborative Delivery**

**Ten Years of Design-Build Experience**

Gary Hart, HRSD

**Collaborative Delivery Perspectives Panel**

Kristina McGee, Virginia-American Water Company; Alan Parent, PC Construction Company; Jim Chastain, Heyward, Inc.;  
Bill M'Coy, HDR Engineering, Inc.

3:30 PM – 4:05 PM **Workforce Management II**

**Succession Planning: It's Easier Than You Think**

Margie Hamner, Starfish Consulting

4:05 PM – 5:00 PM **Effective Utility Mgmt**

**What is EUM & Fairfax County's EUM Experience**

Matt Adams, Fairfax County; Michael Matichich, Jacobs

**Networking Social**

# Presentations

## Asset Management (10:15 – 11:45 AM)

### Keys to a Successful Asset Management Program

Anas Malkawi, HRSD; Alton Elchols, Loudoun Water; Nina Andgren, UOSA

Asset management program managers will provide brief presentations on what they have found are the keys to successful asset management programs and then as a panel will field your questions on their experiences building these programs.

### Closing the Gap between Asset Management and O&M Through Application of Data Analytics Solutions

Prabhu Chandrasekeran, Stantec

Audience will gain a greater understanding of how data management plays a vital role in the management of energy use, operational costs and asset optimization in the water and wastewater industry. Defense will be made to show there is a contemporary research need to identify current leading practices on the type of data to be collected, the method to be used for data collection, appropriate data analysis methods, and data management practices for energy efficiency and treatment process optimization within the constraints of delivered water quality and maintenance costs of the asset.

## Financial Management (10:15 – 11:45 AM)

### Rate Setting and Stakeholder Engagement

Robbie Cornett, Washington County Service Authority; Bart Kreps, Raftelis

The Washington County Service Authority (WCSA) embraced an interactive approach to stakeholder engagement during its most recent water and wastewater rate study. In addition to the core components of a comprehensive rate and financial planning study, WCSA created a Citizen's Advisory Task Force (Task Force) that met multiple times during the study, provided valuable input and, ultimately, supported the recommended rate increases. This presentation will highlight the critical elements of a rate study and discuss WCSA's approach in establishing the Task Force including participant composition, meeting topics and structure, and mechanisms for feedback.

### A Different Look at Financial Wellness

Melissa Josey-White, HRSD

Hampton Roads Sanitation District (HRSD) has been working with local partners to learn more about the financial challenges low income rate payers are having and develop a program for those who are unable to pay their bills to obtain financial counseling services. Customers who have had their water services shut off twice in 12 months are recommended to the program. They work with financial counselors to develop a plan to balance their revenues and expenses. Customers who participate and complete the program have an opportunity to have their past due balances forgiven. This presentation will share what HRSD has learned since the planning and implementation of this program.

# Presentations

## Utility Managers Panel (12:30 – 1:30 PM)

### Controversial Statements

Ted Henifin, HRSD; Karen Pallansch, AlexRenew; Jackie Jarrell, Charlotte Water and WEF President; Roddy Mowe, Loudoun Water; Calvin Farr, City of Richmond

You are going to want to be present as our water industry leaders take on some of the biggest and most controversial statements facing the industry today. As Shawn Heselton with HRSD is the moderator for this panel, this discussion is guaranteed to be interesting and entertaining.

## Capital Improvement Projects (CIP) Management (1:45 – 3:15 PM)

### Aim Small to Hit Small - Improving the Accuracy of CIP Reporting

Thom Lipinski, Loudoun Water

For many utilities, annual forecasts for CIP budgets commonly exceed actual year-end spending. The capability to spend and forecast accurately are influenced by many factors. Using a bottom-up planning approach can help forecast a target that is easier to hit.

### Prioritizing Your CIP

Brandon Pfleckl, Prince William County Service Authority; Chengyan Zhang, Stantec

This presentation will share first-hand experience of the journey of development of a CIP prioritization approach and its evolution and connection to the development of an integrated annual planning framework. Presenters will share key components of the integrated planning framework with focus on the development of a new CIP prioritization process.

### Owner and Contractor Perspectives on Scheduling

Laurel Xiao, Fairfax County; Sandy-Kae Gray, Stantec; Mike Hundley, Black & Veatch

The presentation will cover the value perspectives for both owners and contractors on the different schedules in project management: pre-award, baseline, construction schedules. It will also cover both the owner and contractor's perspectives on scheduling claims and change orders.

## Workforce Management I (1:45 – 3:15 PM)

### Generational Differences: Real or Imagined?

Dave Francis, Dewberry

Now more than ever, leaders must build meaningful relationships to engage and retain their employees. Often leaders feel ill equipped connecting with staff of all generations and from multi-cultural backgrounds. This discussion will focus on practical and actionable ways you can develop successful working relationships.

### Successful High School Apprenticeship Program

Neil Norris and Mike Altizer, Western Virginia Water Authority

The Western Virginia Water Authority partnered with the Roanoke County school system and the Virginia Department of Labor to implement a high school apprentice program. The program has widely been recognized as a potential model for other utilities and businesses who are seeking ways to address the loss of experienced personnel from the industry. A successful apprenticeship program utilizes knowledge capture of existing staff as an integral part of the process and helps apprentices eventually enter full employment with a significant level of field experience supplemented by classroom work to compliment the goals of the Utility and licensing experience/education requirements.

# Presentations

## Collaborative Delivery (3:30 – 5:00 PM)

### Ten Years of Design-Build Experience

Gary Hart, HRSD

HRSD embarked in design-build over 10 years ago and now has multiple projects under its belt, ranging from administration buildings to treatment facilities. This presentation will provide the lessons learned gained by this vast experience.

### Collaborative Delivery Perspectives Panel

Kristina McGee, Virginia-American Water Company; Alan Parent, PC Construction Company; Jim Chastain, Heyward, Inc.; Bill M'Coy, HDR Engineering, Inc.

This panel discussion, moderated by Bruce Husselbee with HRSD, will focus on the benefits and challenges of collaborative project delivery methods including Design-Build, CMAR and P3. This diverse panel will provide their unique views on methods to improve project delivery.

## Workforce Management II (3:30 – 5:00 PM)

### Succession Planning: It's Easier Than You Think

Margie Hamner, Starfish Consulting

This is an interactive and practical presentation that will define and outline the key components of a succession plan and identify easy steps that can be taken right away, regardless of your position within the utility. Participants will receive a Succession Plan Worksheet to help prioritize which succession planning components are most important, determine who needs be involved and what specific action steps can be taken towards developing your own succession plan.

## Effective Utility Management (EUM)

### What is EUM & Fairfax County's EUM Experience

Matt Adams, Fairfax County; Michael Matichich, Jacobs

In 2008, AWWA, the EPA and nine other association partners representing the US water and wastewater sector collaborated to develop what is now known as Effective Utility Management (EUM). This presentation will provide an overview of EUM principles and tools available, including the EUM Primer and update. Attendees will also learn from Fairfax County's experience using EUM, specifically how they are addressing workforce issues, including hiring and maintaining a skilled staff.

# Conference Logistics

## Networking Social

### **The More the Merrier - Joint Utility Management Conference and Education Conference Event**

5:00 PM – 8:00 PM

Enjoy a buffet style dinner and beverages with water professionals who are attending one or both of the great conferences VWEA and VA AWWA are hosting at the Westin. We hope all can join even if you can't make the other conference. The social is included with both conference registrations, so it is essentially a free fabulous meal with great company.

## Conference Registration

### **Regular Registration**

Members and Non-members: \$225

### **Early Bird Registration (register before March 31, 2020)**

VWEA | VA AWWA Members ONLY: \$195

### **★ SPECIAL OFFER - Register for both Virginia Utility Management Conference and VWEA Education Conference and pay this one time fee**

*(stay for the Education Conference being held the next day at the Westin and save money on both)*

Members and Non-members: \$300

### **Exhibitor Space**

Members and Non-members: \$425

### **Social Event Sponsorship - Sponsors names/logos will be displayed at the evening social**

Members and Non-members: \$150

#### Links to Registration

<https://www.vwea.org/events/EventDetails.aspx?id=1201968&group=>



# Conference Logistics

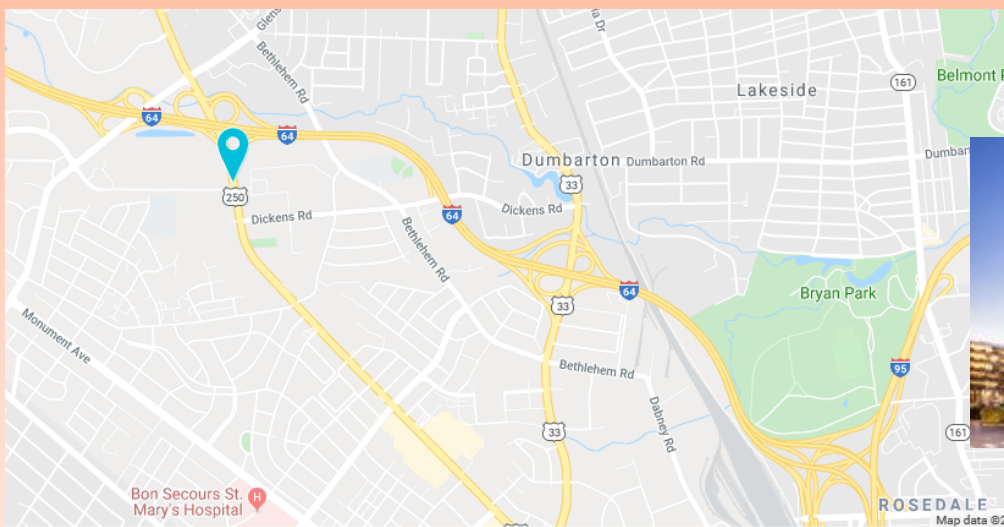
## Conference Location: Westin Richmond

### Making Reservations:

If you are staying overnight, please take advantage our event room block (Virginia Utility Management Conference & VWEA Education Seminar). We have a locked-in rate of \$152 plus tax. Reservations made through our room block help us keep our costs down. Thank you.

### Directions:

6631 W. Broad Street, Richmond, VA 23230 | (804) 282-8444



### Links to Reservations

**Marriott-VWEA Block**  
<https://qrgo.page.link/CGZgQ>



## Questions?

### Conference and Hotel Registration

Kathy Rabalais [Kathy.Rabalais@vwea.com](mailto:Kathy.Rabalais@vwea.com)

### Conference Details

Paul Delphos [Paul.Delphos@aecom.com](mailto:Paul.Delphos@aecom.com) or Christene Mitchell [CMitchell@hrsd.com](mailto:CMitchell@hrsd.com)