

CIFA SRF Professional Development Program

SUNDAY, NOVEMBER 6: PRE-WORKSHOP SESSIONS

9:00 – 11:00 am **Streamlining Exercise: Embrace a Culture of Continual Improvement**
Learn how to analyze your process and find tangible ways to increase transparency, streamline your procedures, and reduce paperwork to make your program more attractive to prospective borrowers as well as more efficient for your team to implement and manage. Hear from your peers how to overcome obstacles and break through the bottlenecks to improve productivity and increase pace of their program.

Moderator: Lori Beary, Beary & Associates

9:00 – 11:00 am **SRF 101: Nation's Premier Program for Funding Water Infrastructure**
1:00 – 3:00 pm
Learn everything you need to know about the Clean Water and Drinking Water State Revolving Funds, from eligible projects to types of financial assistance to policies and processes for delivering state and federal funding to communities.

- William Carr, Kansas Department of Health and Environment
- Felicia Freeman, Tennessee Department of Environment and Conservation
- Keith McLaughlin, Colorado Water Resources and Power Development Authority

11:00 am – 1:00 pm **CIFA Community Connection (Brunch) (CIFA Members Only)**

6:00 – 7:00 pm **CIFA SRF Workshop Welcome Reception**

MONDAY, NOVEMBER 7: PLENARY

8:00 – 9:00 am **Networking Breakfast**

9:00 – 10:15 am **Opening Plenary**

See What's on Tap in the Show Me State

Dru Buntin, Director of the Missouri Department of Natural Resources, will share the story of water in Missouri, starting in St. Louis, which is known for many things, including being headquarters of Anheuser Busch and home to the iconic Budweiser Clydesdales. He'll tell the groundbreaking history of St. Louis water, including how the city's water purification system is considered one of the most important civic improvements of the Progressive Era. (There's a reason the beer tastes so good!) Then, he'll delve into the depth of the Table Rock Lake water quality improvement story. Finally, he'll dive into a discussion about the future of SRF, and the state-led transformational opportunity presented by the American Rescue Plan Act and the Infrastructure Investment and Jobs Act.

Meet Manny

Manny Teodoro, researcher, professor, author and nationally recognized thought-leader on water policy, will share insights for effective financing for water infrastructure based on analysis of risk and organizational sustainability. His work is driven by the belief that science, not storytelling, should drive policy and management in the water sector, and his research stands at the nexus of politics, public policy and public management.

10:15 – 10:30 am **Break**

10:30 – 11:45 am **Concurrent Learning Sessions**

Time to Take Inventory

Learn what you need to know to develop a plan for funding lead service line inventories. Get a briefing from EPA on guidance for developing inventories and how set-asides can be used to fund the projects. Hear from industry experts about lessons learned from their experience conducting inventories, especially in disadvantaged communities. Hear about a newly created framework for soliciting bids for contractors to conduct inventories.

Moderator: Matt King, U.S. Environmental Protection Agency

Presenters:

- Hannah Holsinger, U.S. Environmental Protection Agency
- Cathy Vogel-Tucker, Kansas Department of Health and the Environment
- Jonathan Flowers, Robinson Engineering
- Tom Nagle, Robinson Engineering

States to the Rescue

Learn how states have prioritized funding from the America Rescue Plan to fund critical water and wastewater infrastructure projects. Hear how North Carolina, South Dakota and Vermont are using State Fiscal Recovery Funds for hundreds of water and wastewater projects in their states.

Moderator: Angela Knecht, Florida Department of Environmental Protection

Presenters:

- Shadi Eskaf, North Carolina Department of Environmental Quality
- Neil Kamman, Vermont Department of Environmental Conservation
- Mike Perkovich, South Dakota Department of Agriculture and Natural Resources
- Andy Bruels, South Dakota Department of Agriculture and Natural Resources

Data-Driven Decisions on Affordability

Learn about online tools developed by Iowa, New York and Utah that use socioeconomic, demographic and geographic data to identify underserved communities and populations. Find out how the SRFs are using these tools to direct financial assistance, such as discounted interest rates and additional subsidy, to provide safe, affordable water and wastewater services to disadvantaged and economically distressed households and neighborhoods.

Moderator: Stacy Barna, CDM-Smith

Presenters:

- Maureen Coleman, New York Environmental Facilities Corporation
- Bill Brizzell, New York Environmental Facilities Corporation
- Michael Grange, Utah Department of Environmental Quality
- Aaron Smith, Iowa Finance Authority

Learning Exchange: Municipal Markets

Learn the latest on what's happening in the municipal markets. Hear how historic funding in the Infrastructure Investment and Jobs Act, rising interest rates, inflation, supply chain disruptions, labor shortages and fears of recession are impacting public financing and overall investment in water infrastructure. Engage in a conversation about how economic conditions, now and in the near future, may impact the SRFs.

Moderator: Tom Liu, BofA Securities

Presenters:

- Robert Mellinger, Citigroup
- Michael Allen, IceMiller Legal Counsel

11:45 am – Noon

Break

Noon – 1:30 pm

Plenary Lunch

1:30 – 1:45 pm

Break

1:45 – 3:00 pm

Concurrent Learning Sessions

Getting Ahead of Emerging Contaminants in Wastewater

Learn how EPA and the SRFs are working together to develop a pipeline of projects to reduce and remediate emerging contaminants in wastewater and stormwater, with a focus on perfluoroalkyl and polyfluoroalkyl substances (PFAS). Hear what makes capital improvement projects and watershed studies, which include monitoring and assessment, eligible (and ineligible) for dedicated funding in Infrastructure Investment. Hear about a watershed study in Oklahoma that is likely to result in a wetlands restoration project to remediate emerging contaminants.

Moderator: Michael Deane, U.S. Environmental Protection Agency

Presenters:

- Smiti Nepal, U.S. Environmental Protection Agency
- Kelly Tucker, U.S. Environmental Protection Agency
- Lori Johnson, Oklahoma Water Resources Board

State Spotlight on SRF Financing Policy

Learn how SRFs create financing policies to achieve their state priorities, including how SRFs develop their portfolio of financing options, set interest rates and fees, determine loan terms, and define criteria for affordability and additional subsidy.

Moderator:

Presenters:

- Jim McGoff, Indiana Finance Authority
- Jerry Rouch, Ohio Environmental Protection Agency
- Mark Wyatt, Texas Water Development Board

Support for Small Communities

Learn how SRFs are helping small and rural communities fund water infrastructure to protect public health and the environment. Hear how Montana's program to provide engineering services is helping small communities develop projects and access financing for water and wastewater projects.

Moderator: Joe Boland, Missouri Environmental Improvement & Energy Resources Authority

Presenters:

- Anna Miller, Montana Department of Natural Resources and Conservation
- MaryAnna Peavy, Idaho Department of Environmental Quality
- Heather Himmelberger, Southwest Environmental Finance Center

Learning Exchange: Build America, Buy America

Learn the latest on implementation of domestic preference procurement requirements for iron, steel, construction materials and manufactured products in the Build America, Buy America Act. Get your questions answered on general applicability waivers and the process for product specific waivers on SRF projects. Engage in a conversation about how EPA and the SRFs can work together to successfully implement the law.

Moderator:

- Kiri Anderer, U.S. Environmental Protection Agency
- Jessica Habashy, U.S. Environmental Protection Agency

3:00 – 3:45 pm

Networking Break

3:45 – 5:00 pm

Concurrent Learning Sessions

Tackling Emerging Contaminants for Safer Drinking Water

Learn how EPA and the SRFs are working together to build a pipeline of projects to remediate emerging contaminants in drinking water, with a focus on perfluoroalkyl and polyfluoroalkyl substances (PFAS). Learn what emerging contaminants are, how SRFs can use the dedicated funding in Infrastructure Investment and Jobs Act to remediate these forever chemicals and other contaminants, and how to develop successful eligible and effective infrastructure projects. Hear from Florida and Colorado about SRF emerging contaminant projects in their states.

Moderator: Howard Rubin, U.S. Environmental Protection Agency

Presenters:

- Bizzy Berg, U.S. Environmental Protection Agency
- Shanin Speas-Frost, Florida Department of Environmental Protection
- Jim Griffiths, Colorado Water Resources and Power Development Authority

State Spotlight on SRF Process

Learn how SRFs move projects, step-by-step, through their financing pipeline, including how the application process works, how projects are scored and approved for the Intended Use Plan and Project Priority List, when environmental, engineering and financial reviews are conducted, and how permitting is handled.

Moderator: Kim Colson, HDR

Presenters:

- Jeff Freeman, Minnesota Public Facilities Authority
- Debby Dickson, Arkansas Department of Agriculture
- Hannah Humphrey, Missouri Department of Natural Resources
- Sara Pringer, Missouri Department of Natural Resources

Expanding the SRF Financing Tool Box

Learn about innovative strategies to expand your portfolio of financing tools. Hear how Alaska is using programmatic financing to fund capital improvement projects for one of the largest utilities in state. Find out how Pennsylvania is capitalizing loan programs for municipalities to expand funding to more projects. Hear about alternative forms of financing that Clean Water SRFs can use to secure a subsidized SRF loan.

Moderator: Shawn Crumlish, Virginia Resources Authority

Presenters:

- Carrie Bohan, Alaska Department of Environmental Conservation

- Brion Johnson, PENNVEST
- Vincent Gauthier, Environmental Defense Fund
- Tee Thomas, Quantified Ventures

TUESDAY, NOVEMBER 8

9:00 – 10:15 am

SRF Townhall

Join the conversation with the SRF community about what's working, what's new and what's next in financing for drinking water and clean water infrastructure projects. Hear from the nation's leaders about their vision for implementation of the historic and transformational Infrastructure Investment and Jobs Act.

- Jim McGoff, COO and Director of Environmental Programs, Indiana Finance Authority, CIFA President
- Jeff Walker, Executive Director, Texas Water Development Board, CIFA Vice President
- Dr. Jennifer McLain, Director, Office of Ground Water and Drinking Water, U.S. Environmental Protection Agency
- Dr. Andrew Sawyers, Director, Office of Wastewater Management, U.S. Environmental Protection Agency

10:15 – 10:30 am

Break

10:30 – 11:45 am

Concurrent Learning Sessions

Meet the Leaders on Lead Pipe Replacement

Learn how SRFs are funding lead service line projects and how programs have adjusted to new requirements in the Infrastructure Investment and Jobs Act. Find out how Indiana is implementing their lead service line program. Get an update on how Pennsylvania is building on efforts started under the Water Infrastructure Fund Transfer Act (WIFTA), known by many as the "Booker Bill."

Moderator: Kelly Ward, Virginia Department of Health

- Brett Roberts, Indiana Finance Authority
- Gary Bingenheimer, Illinois Environmental Protection Agency
- Robert Boos, PENNVEST

Thinking Outside the Pipe

Learn effective strategies for financing projects to prevent nonpoint source pollution and protect drinking water at the source. Discover ways to address the nation's largest remaining water quality challenge through a tour of EPA's *Clean Water SRF Best Practices Guide for Financing Nonpoint Source Solutions* and discover how Maryland is using CWSRF to cost-effectively reduce nonpoint source loadings to the Chesapeake Bay.

Hear an in-depth analysis of SRF financial data on source water protection projects.

Moderator: Alison Souders, U.S. Environmental Protection Agency

- April Byrne, U.S. Environmental Protection Agency
- Don Waye, U.S. Environmental Protection Agency
- Paul Emmart, Maryland Department of Environment

Let's Get Together!

Learn how the SRFs are bringing people together to provide safe, reliable drinking water and wastewater services to their community. Here how faith-based leaders brought together a community in Delaware to resolve decades of problems with water and wastewater. Learn how Louisiana's Drinking Water SRF Consolidation Initiative is using 100% principal forgiveness to incentivize the inclusion of utilities that are not meeting water quality standards. Hear how Ohio's focus on regionalization is yielding results with success stories for both drinking water and wastewater.

Moderator: Jessica Pena, Texas Water Development Board

- Jon Bernstein, Ohio Environmental Protection Agency
- Sandi Spiegel, Delaware Department of Health and Social Services
- Blake Fogleman, Louisiana Department of Health

11:45 am – Noon **Break**

Noon – 2:00 pm **CIFA Members Meeting and Lunch**

TUESDAY, NOVEMBER 8

2:00 – 5:00 pm State EPA SRF Workgroup Meeting

WEDNESDAY, NOVEMBER 9

8:30 am – 5:00 pm State EPA SRF Workgroup Meeting