STATEMENT OF QUALIFICATIONS

City of Wausau
Wausau Water Works

Developing and Implementing a Lead Service Line Replacement Program Utilizing Performance Contracting and the CBP3 Delivery Model

Due: July 18, 2023 | 10:00am CST

COMMUNITY INFRASTRUCTURE PARTNERS

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July 18, 2023

Eric Lindman, P.E.
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Re: City of Wausau, Wausau Water Works, Request for Professional Qualifications, Developing and Implementing a Lead Service Line Replacement Program Utilizing Performance Contracting and the CBP3 Delivery Model

Dear Mr. Lindman:

The passage of the Bipartisan Infrastructure Law ("BIL") and its billions of dollars for water infrastructure represents a once-in-a-generation opportunity for communities like Wausau to eradicate a public health scourge faced by their residents once and for all: toxic lead service lines. That said, while the BIL provides an unprecedented level of funding and an opportunity for communities like Wausau, the funding is limited and highly competitive, especially in light of how many communities throughout the state are facing the same problem. With this in mind, it is critical for the City of Wausau and its ratepayers to develop a lead service line replacement program that enables the city to (1) secure as much funding as possible from the Wisconsin Department of Natural Resources ("WDNR") who is administering the BIL funding for lead service line replacements and other State Revolving Funds; (2) receive as much of the funding as possible in the form of principal forgiveness to minimize the future debt burden on its rate payers; (3) spend the funding as efficiently, equitably, and effectively as possible to replace the most lines and maximize all available funding; and (4) pursue local economic development through the utilization of local, small, and minority-owned businesses to perform a significant amount of the work as the program scales up over the five-year term.

The delivery model the City of Wausau is procuring for—a Community Based Public Private Partnership ("CBP3")—is one in which the experience of the Community Infrastructure Partners ("CIP") team is unrivaled, as you will read throughout this response. Core to every successful CBP3 is the ecosystem of delivery partners that is responsible for delivering all the essential components of the infrastructure to the community. The CIP team includes 120Water, Blue Conduit, DAAR, Environmental Policy Innovation Center ("EPIC"), Wisconsin Laborers' District Council, Water Finance Exchange, and H2N. This team represents a blend of local, state, and national experience that cannot be replicated, and includes a proven track record and best-in-class expertise on financing, tracking, testing, community outreach, planning and construction, and workforce development.

Because this level of funding for lead service line replacements has never been available before, municipalities and utilities across the country are struggling not only with the parameters of how the BIL funding will work, but how they will scale up to maximize the opportunity during the five-year term of the funding. Only through the selection of an experienced CBP3 developer can the City of Wausau best achieve those goals. That level of experience will also enable Wausau to best transfer delivery risk to the private partner while ensuring that the city obtains the desired socioeconomic outcomes through Key Performance Indicators ("KPIs") that govern the private partner's compensation through the performance contracting mechanism. Additionally, CBP3s have proven to save communities by more than 30% when compared to traditional approaches.

The City of Wausau is to be commended for being the first municipality in the country to pursue an alternative delivery model for the removal of their lead service lines. By virtue of this, we believe our extended team of national thought leaders and practitioners at the federal, state, local levels and in philanthropic circles can leverage the work to elevate Wausau onto the national stage for pioneering this approach. We believe this will be attractive not only for securing additional funding and support services for Wausau, but also for promoting Wausau as a regional hub for its smaller, more rural neighbors.

Our team could not be more excited at the opportunity to partner with the City of Wausau on this journey—one that can not only serve as a model delivery model for the rest of the country, but also may prove to be the fastest and most cost-effective, equitable, and efficient way to eliminate a longstanding public health issue for the Wausau community.

Sincerely,

Shawn Kerachsky
President and CEO
Community Infrastructure Partners

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PROJECT TEAM

PROJECT TEAM

Community Infrastructure Partners ("CIP") is the Consultant and CBP3 developer responding to this Request for Qualifications ("RFQ") and offers the City of Wausau and Wausau Water Works (collectively "the City") umatched leadership expertise in the development, implementation, and management of CBP3s in the United States. To successfully develop and implement a lead service line replacement program utilizing performance contracting and the CBP3 delivery model (the "Program"), CIP has assembled a team of national and local industry experts. As evidenced throughout this response, the CIP team brings best-in-class qualifications in the execution and management of lead service line replacements, project financing, and comprehensive CBP3 programs. **Table 1.1.** provides an overview of the CIP team members and their roles for the Program.

Table 1.1: The CIP Team for the Program

Team Member	Role
CIP	Consultant / CBP3 Developer
120Water*	Software, Reporting, and Outreach
Blue Conduit*	Predictive Analytics
EPIC*	Government Relations, Technical Assistance, and Capital Sourcing
DAAR	Engineer and Prime General Contractor
Wisconsin Laborer's District Council / LIUNA*	Workforce and Contractor Development
H2N	Community Outreach
Water Finance Exchange	Project Financing and Regionalization
M Serafino LLC	State of Wisconsin Government Relations
Medical College of Wisconsin	Public Health Management and Advisory Services

** Denotes firms participating in the inaugural Biden-Harris "Get the Lead Out" Partnership*

As a fully integrated team, we not only bring the right technical expertise in all areas of execution critical to the Program, but we also bring a team of passionate individuals ready to deliver. Led by top talent at each firm, this impressive group of individuals bring the collaborative, flexible, solutions-oriented mindset needed to facilitate a successful Program delivery and achieve the City's objectives.

TEAM INTRODUCTIONS

Community Infrastructure Partners

Consultant / CBP3 Developer

CIP will be the Consultant and CBP3 developer entering into the contract with the City for the Program and was established in 2022 by a team of innovative leaders dedicated to improving the nation's water infrastructure through the use of CBP3s. CIP's leadership team offers more than 40 years of collective experience leading the development of largescale infrastructure projects and implementation CBP3s, including the only three operational CBP3s to date (the Clean Water Partnership, the Fresh Coast Protection Partnership, and the Chester, PA CBP3). As a result of this unparalleled industry experience, CIP offers a deep understanding of how to partner with communities to successfully incubate the local workforce, leverage private sector financial expertise, and accelerate progress towards each community's resilience goals.

CIP offers Key Personnel with experience in the areas of strategy, finance, construction management, operations and maintenance ("O&M"), planning and project sourcing, contractor development, community outreach and relations, ESG, and climate resilience. This hands-on expertise enables CIP to successfully educate stakeholders and ensure each CBP3 is set up to achieve positive outcomes at all stages of a project's lifecycle—from planning and procurement through completion.

By applying best practices and lessons learned from CIP Key Personnel's highly relevant experience serving in a similar Consultant/lead role across

CBP3 programs, the Program will benefit from a strong leadership foundation from day one. Rather than spending time learning how to efficiently manage the team and coordinate various disciplines, digesting the nuances of the CBP3 delivery model, or negotiating fundamental elements of the contractual risk transfer, the CIP team will instead rely on past experience, precedent documentation, and proven strategies for integration and risk management to allow focus on the unique characteristics of the Program. This will benefit the City by freeing up more time for CIP to tailor solutions to the Program's needs, challenges, and to addressing the more granular objectives of the City.

120Water

Software, Reporting, and Outreach

120Water is a Water Quality as a Service provider and will lead project controls and reporting for the CIP team. Since 2016, 120Water's software has been the foundation for executing and reporting water quality programs for state agencies, municipalities and facilities across the country. From statewide program implementation of a lead service line inventory project, managing sampling and customer communications for an individual utility, or coordinating lead sampling in schools and daycares, 120Water's proven approach has been adopted by more than 2,000 customers in 41 states.

120Water's commercial off-the-shelf cloud software, point-of-use kits and managed services will enable the City to eliminate fragmented data, with the software automating everything from compliance and sample management to dashboards and communication. This cloud-based, modern technology is natively designed to combine asset, customer, and sampling data in a centralized platform to facilitate Lead & Copper Rule compliance programs. It is designed specifically to foster collaboration between a multitude of stakeholders, without requiring a high degree of technical expertise. This data foundation then allows 120Water to automate customer communications, sampling efforts, track tier sites, and send quality-controlled progress reports to the City.

The 120Water team of professionals includes water quality experts, program consultants, data engineers, and direct-to-consumer marketing experts that have a deep knowledge of the revised Lead & Copper Rule and established best practice playbooks to execute all components of the revised Lead & Copper Rule at scale. When possible, 120Water augments its team with local, minority owned, and/or not-for-profit subcontractors who have strong local ties with the systems it serves. Additionally, 120Water has established a partnership with National Rural Water to align 120Water expertise with local circuit riders and technical assistance personnel, in addition to educational workshops to teach systems what is needed to comply with the LCRR.

120Water is the only company in the United States with a standardized platform to manage the verification, replacement, and sampling components of the new Lead & Copper Rule, visualize key performance indicators, and communicate the necessary information to the right stakeholders at the right time. This technology is rapidly deployed, within weeks, for the CIP team and the City to immediately begin the Program.

Blue Conduit

Predictive Analytics

Blue Conduit is an Ann Arbor-based water infrastructure analytics company specializing in predictive analytics for lead service line identification and replacement that started within the University of Michigan in 2016 and independently incorporated in 2019. With a team of approximately 25 dedicated staff members around the U.S., it utilizes intelligent data insights and predictive machine learning methods to support cities and their engineering partners to inventory and replace lead service lines.

BlueConduit's mission and history is rooted in communities burdened by lead contamination in their water supply. During the City of Flint's water crisis in 2016, University of Michigan researchers analyzed city data to provide statistical and algorithmic support to guide decision-making and data collection. This team of researchers invented the approach of using data science and machine learning for lead service line inventory and replacement projects. Those initial insights, combined with seven additional years of work in this space, are built into BlueConduit's Smart SLM Inventory Solution and continue to empower water systems to successfully locate and remove their lead service lines.

BlueConduit is partnered with 120Water to deliver a best-in-class, Lead Service Line Inventory and LCRR Compliance solution. BlueConduit will work with the City's existing inventory data from the 120Water platform to develop material predictions and reduce unknowns. BlueConduit's machine learning methodology and approach is aligned with the guiding Principles of Data Science for Lead Service Line Inventories and Replacement

RELEVANT PROJECT EXPERIENCE

BlueConduit

City of Flint Lead Service Line Replacement

Flint, Michigan

City officials began collaborating with the BlueConduit team in 2016, when BlueConduit provided the first ever development of a predictive LSL model, with parcel-level predictions indicating which homes were most likely to have lead service lines. This effort would eventually guide the largest and most prominent water service line infrastructure remediation project ever attempted. The model initially predicted 37% of connections as lead service lines; six (6) years and 25,000 replacements later, the actual replacement percentage was determined to be 39%, reflecting an accuracy of approximately 95%.

Programs and in accordance with the EPA Guidance for Developing and Maintaining a Service Line Inventory. BlueConduit will also adhere to specific state-level guidance and compliance requirements as applicable to the geographic location of the Program.

By combining the 120Water technical architecture with BlueConduit's robust data analytics, service line inventory management and compliance will be simplified and efficient. BlueConduit and 120Water's integration allows the 120Water platform to display BlueConduit material predictions, indicating the likely locations of lead service lines, galvanized steel/iron pipes with or without lead goosenecks, and the remaining materials used in the water system.

BlueConduit now serves more than 200 communities in the U.S. and Canada, and has inventoried more than 2 million service lines that serve more than 4 million US residents. The company's list of active project partners include the Rockefeller Foundation, Google.org, the Natural Resources Defense Council ("NRDC"), 120Water and scores of public water systems and engineering firms. As BlueConduit continue to grow, it remains aligned with the Federal Government's Justice40 Initiative, which sets a goal to invest in communities that are marginalized, underserved, and overburdened by pollution. BlueConduit is also very proud to have the company's work recognized and sited in the EPA Guidance Manual for Developing and Maintaining a Service Line Inventory.

EPIC

Government Relations, Technical Assistance, and Capital Sourcing

The Environmental Policy Innovation Center ("EPIC") advances policies that deliver spectacular improvement in the speed and scale of environmental progress. A nonprofit with headquarters in Washington, DC and with a remote team of engineers, community advocates, policy analysts, and data scientists located across the country (including in Wisconsin), EPIC is committed to finding and highlighting the best approaches to scaling up positive results quickly. EPIC focuses on environmental markets, data and technology, endangered species, and clean water, and will support the CIP team by providing unparalleled research and expertise to support the Program.

Equity and justice are at the center of EPIC's approach to ensure clean water, as it works on policies aimed at eliminating disparities in funding, access, and environmental services faced by disadvantaged communities. Related to lead service line replacement, EPIC is committed to helping put the nation on track to replace lead pipes quickly, equitably, and efficiently. EPIC uses a three-pronged approach to help communities overcome disparities in water infrastructure access and investment:

1. Conducting data and research to better understand which communities are benefiting from water infrastructure investments and making progress on replacing lead pipes;
2. Delivering technical assistance and capacity building to improve community access to funding, tools, and technology through EPIC's Funding Navigator program and role as an Environmental Finance Center ("EFC") selected by the US Environmental Protection Agency ("US EPA"); and
3. Advancing effective and equitable policies in support of short and long-term changes in how federal funds are dispersed at the state level and building momentum for water infrastructure investment in the communities who need it most.

RECENT RELEVANT EXPERIENCE

EPIC

Government Advisory and Policy Implementation Experience

Nationwide

In 2023, EPIC was part of a steering committee to launch the **White House Get the Lead Out Partnership** to build momentum among mayors and other elected officials to replace lead service lines over the next decade.

In 2023, EPIC was part of a coalition that helped advance the **Lead Pipe Right to Know Act** in the New York State Legislature, which, if enacted through the Governor's signature, would increase transparency around the location and number of lead service lines in the state.

In 2023, EPIC helped two members of the **Great Lakes and St. Lawrence Cities Initiative** draft resolutions related to federal funds for lead service line replacement: Sheboygan, Wisconsin and Rochester, NY.

In 2022, EPIC was selected by the US EPA as one of four national Environmental Finance Centers to connect disadvantaged communities to Bipartisan Infrastructure Law funds for water infrastructure. As part of this work, EPIC is focused on disadvantaged communities between 10,000 and 100,000 in population size and on helping communities replace lead service lines through its **Funding Navigator Program.** The Funding Navigator Program is supported by this EPA grant and by philanthropic donors delivers technical assistance on a wider range of drinking water, stormwater, and wastewater issues.

Water Finance Exchange

Project Financing and Regionalization

Water Finance Exchange ("WFX") will work closely with CIP to provide project financing and regionalization services for the Program. Founded in 2020, WFX is a 501c3 nonprofit with a mission to help communities access funding, financing, and expertise to implement resilient, sustainable, and equitable water infrastructure solutions. WFX is a proven national leader in the water infrastructure sector at a time when the federal government has made a major investment to address decades of deferred infrastructure funding with the support of technical assistance intermediaries like WFX. In less than two years, WFX has developed a leading partnership model and its technical assistance support and pre-development loans have catalyzed more than $30 million in water infrastructure investments. Currently, WFX works in several states, including actively working with 27 communities and several regional collaborations involving a lead community and unincorporated or rural communities. Additionally, WFX has raised more than $3 million in funding from private philanthropy to realize projects and fund technical assistance operations for communities. WFX is an organization that sits at the inflection point of state/federal and philanthropic funding access to bring blended capital to water infrastructure needs.

WFX brings a diverse set of perspectives that are complimentary to the goals of the City. These perspectives include former federal and state regulators, a city manager, a major utility operator, public finance and philanthropic directors, which will work together seamlessly with the CIP team to deliver a uniquely qualified and multifaceted group of experts. WFX has nine employees on staff with an additional 18 active board members and advisors, including an advisor to the U.S. EPA's Water Infrastructure Finance and Innovation Act ("WIFIA") program, a representative from an EPA Environmental Finance Center ("EFC"), Senior EPA officials, and several representatives from nationally renowned private and nonprofit organizations in the water, environmental, and infrastructure sectors.

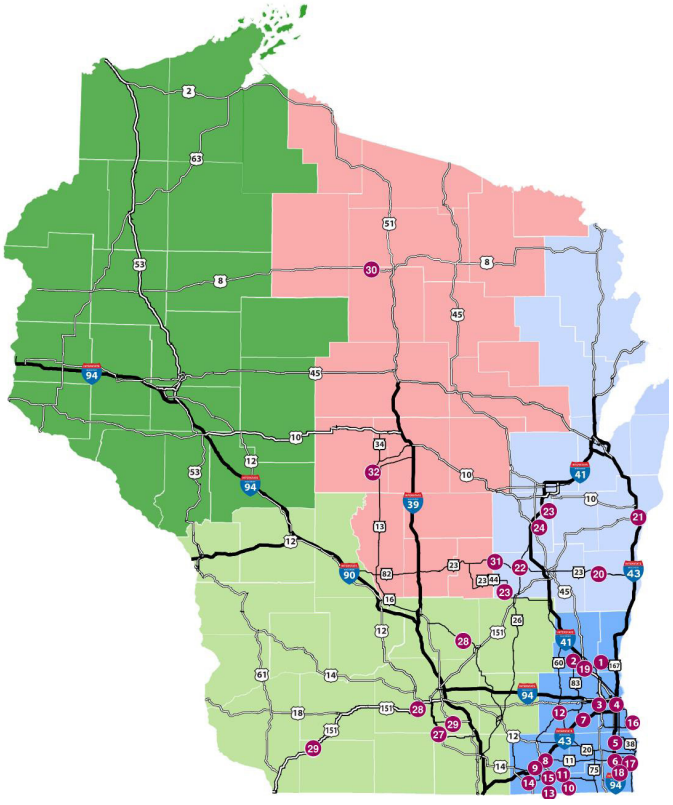
DAAR

Engineer and Prime General Contractor

Founded in 2001 and headquartered in Milwaukee, DAAR Engineering, Inc. (“DAAR”) is an MBE-certified business and a leading multidisciplinary firm with the capacity and expertise to provide quality delivery of planning, engineering, and construction management services for the Program.

DAAR’s dedicated Key Personnel are committed to providing a comprehensive, collaborative approach and commitment to customer satisfaction that will ensure the City’s Program goals are met and projects are delivered on-scope, on-schedule and on-budget. As a company, DAAR is qualified to manage a variety of small and large scale projects, and is focused on developing comprehensive strategies that advance workforce development objectives and maximize MBE and local business participation. To date, DAAR has completed more than 5,300 projects – most in the state of Wisconsin – and has won more than 25 industry awards. **Figure 1.2** highlights select project experience in the state of Wisconsin.

Figure 1.2: Map of Select DAAR Project Experience in Wisconsin



H2N

Community Outreach

The Hmong and Hispanic Communication Network ("H2N") was borne out of the COVID-19 pandemic in 2020. In response to existing communication barriers with Hmong and Hispanic communities, the goal was to strengthen communication channels and facilitate regular information exchanges between community agencies and people in Hmong and Hispanic communities. There was an earlier realization that anchor institutions and local governments were not prepared or equipped to reach immigrant communities to prevent and mitigate the spread of COVID-19. Health departments and systems were ill-prepared to communicate with people who did not speak English, read, listen to local TV stations, or visit public health or health system websites. They were not prepared to deal with the historical trauma of refugees or religious/cultural disease constructs that do not include viruses. They were not prepared for people afraid to answer their phone when a strange number appears or fearful that they could lose their home immediately if they do not go to work. They were not prepared for the general distrust of health agencies on the part of community agencies and Hispanic and Hmong communities.

In response to all of those concerns, H2N representatives act as a reliable source of information and resources for community members. Community coordinators and community health workers stay up to date on new information, resources, protocols, regulations and guidelines. These resources are then provided to community members in their own language. Community members are reached in several ways including

Early COVID-19 Pop-up Clinics in Wausau
H2N

visits to farms, community events, Hispanic and Hmong grocery stores, churches, and food distribution events. The relationships and connections made by H2N Community Health Workers will be essential in assisting with commnity outreach efforts for the Program.

Wisconsin Laborer's District Council / LIUNA

Workforce and Contractor Development

The Wisconsin Laborers' District Council is an affiliation of five local unions, representing nearly 9,000 construction craft laborers throughout Wisconsin. The Wisconsin Laborers' District Countil is the most diverse trade in the construction industry and is part of the Laborers' International Union of North America ("LIUNA")—one of the largest labor organizations in the world—representing more than 500,000 workers across the United States and Canada, fighting for better wages and benefits, safer jobsites, and greater opportunity.

The Wisconsin Laborers' District Council will provide workforce development support to the Program, and is dedicated to assisting members and members' families both on and off the job by providing a network of services and support designed to make life safer, healthier, and financially more secure. One of the critical strategies to ensuring a growing and continued availability of laborers in Wisconsin is engaging community-based organizations, faith-based communities, educational institutions, governmental, and private sector partners. These collaborative relationships help drive awareness and understanding of career opportunities as a union laborer. Creating a sustainable pipeline of laborers is necessary to continue providing a well-trained workforce for current and emerging industry needs.

The Wisconsin Laborers' District Council works with both state-wide organizations like WRTP/BIG STEP and the Wisconsin Department of Corrections, and also with regional organizations such as the Milwaukee Water Equity Task Force, county Boys and Girls Clubs, workforce development boards, and worker training programs to provide education and prepare pathways to a lifelong career as a union laborer.

Medical College of Wisconsin-Central Wisconsin

Public Health Management and Advisory Services

In July 2016, Medical College of Wisconsin-Central Wisconsin ("MCW-CW") matriculated its first class of medical students at its newest campus in Wausau, WI, working in partnership with the best academic and medical facilities in the region. MCW-CW is a regional campus that develops community-focused physicians who will meet the healthcare needs of Central Wisconsin and surrounding regions.

MCW-CW provides an innovative and focused three-year curriculum to train primary care physicians (family medicine, pediatrics and internal medicine), and psychiatrists who want to live and work in the region when they complete their medical education. The program is community-focused, involving many community providers and organizations in the outstanding curricular activities for its learners. Students work side-by-side with community physicians while on clerkship rotations.

MCW-CW is hyper aware of the dangers of lead in drinking water and the impacts that it has on communities. In support of the CIP team and the Program, MCW-CW will offer the ability to identify impacted residents and develop programs and services to address those effects is crucial in areas where exposure has already occurred.

M Serafino LLC

State of Wisconsin Government Relations

M. Serafino LLC is a government affairs firm based in Milwaukee, Wisconsin that represents private companies and institutions in their interactions with municipal, county and state government. the firm specializes in relationship building between units of government so that its clients can achieve their legislative, development, financing, construction or permitting/licensing goals. With 30 years of government, non-profit and community experience, the firm's principal has a wide breadth of experience to benefit each client.

KEY PERSONNEL

One of the core benefits of the CBP3 delivery model is the multi-dimensional nature of the team that is assembled to deliver the infrastructure in order to achieve the governing performance metrics of the Program. The CIP team has been structured to provide the highest level of service and expertise across all disciplines to meet and exceed the objectives of the City. In addition to CIP, which has the most collective CBP3 experience and expertise of any firm in the country, the extended team is a combination of local and national subject matter experts, practitioners and thought leaders, as detailed on the previous pages. The CIP team reflects the objectives that the City has articulated in the RFQ and is unparalleled in its demonstrated ability to exceed the expectations of the City and the greater Wausau community.

Resumes depicting the relevant experience of Key Personnel are provided in **Section 2: Relevant Experience**, however, we have highlighted a few Key Personnel below and the extensive experience and qualifications they bring to the Program.

Shawn Kerachsky, CIP

Program Executive

With more than 28 years of experience, Shawn has been instrumental in structuring and executing the nation's first CBP3s as well as multiple traditional public-private partnerships. In his role as CEO of CIP, Shawn educates policy makers, industry leaders, and project owners about new approaches to efficiently deliver programmatic infrastructure solutions while maintaining an emphasis on community engagement and economic development. Prior to founding CIP, Shawn was the Managing Director of the CBP3 unit for a US-based infrastructure developer. In this role, he oversaw the successful management and operations of the company's existing portolfio which included the first-ever CBP3, the Clean Water Partnership with Prince George's County, Maryland.

Pete Littleton, CIP

Implementation Lead

Pete is COO of CIP and brings more than 25 years of experience in project development and is a pioneer in establishing and operating large-scale green and grey stormwater infrastructure programs across the United States. His experience includes leading the planning, delivery, and management of all three operational CBP3s in the country: the Clean Water Partnership in Prince George's County, Maryland, the Fresh Coast Protection Partnership in Milwaukee, Wisconsin, and the Chester, Pennsylvania CBP3. Pete is recognized for his ability to build dynamic program teams consisting of local design, contracting, maintenance, and communications firms as well as NGOs and community-based organizations to maximize community benefits for each partnership.

Sean Agid, CIP

Financial Structuring Co-Lead

As CBO of CIP, Sean brings more than 10 years of experience including the planning, structuring, closing, and/or ongoing delivery oversight of infrastructure programs totaling more than $300 million in value. Prior to founding CIP, Sean was the Director of Partnerships and Financial Structuring for a US-based infrastructure developer focused on P3 and CBP3 projects. One of his key accomplishments in this role was serving as an integral member of the leadership team responsible for the planning and execution of the first-ever CBP3, the Clean Water Partnership with Prince George's County, Maryland. Since that time, he has continued to play an essential part in advancing the CBP3 delivery model, including acting as the finance lead for such notable projects as the Chester, PA CBP3 and the Fresh Coast Protection Partnership in Milwaukee.

Megan Glover, 120Water

Lead Reduction Strategist

Megan is the founder and CEO of 120Water. She is responsible for creating the industry leading playbooks and executing many of the Country's most prominent lead reduction and replacement programs including: City of Chicago, State of Indiana, Pittsburgh Water and Sewer Authority, Newark, Denver Water. Under Megan's leadership, 120Water's platform works with 12 state regulatory agencies and over 3000 water systems across the country to execute all of the lead programs related to LCRR. She is also an Inaugural Member of the White House's Get the Lead Out Partnership.

Tim Male, EPIC

Government Relations Strategist (Federal)

Tim is the founder and Executive Director of EPIC. He co-authored EPIC's report, Replacing Toxic Lead Pipes Faster, which included examples of Public Private Partnerships as a potential for lead service line replacement. Prior to launching EPIC, he served as an Associate Director at the White House Council on Environmental Quality, where he directed a team

in the Executive Office of the President ("EOP") responsible for policy and program initiatives.

Maureen Cunningham, EPIC

Financial Structuring Co-Lead

As EPIC's Chief Strategy Officer and Director of Water, Maureen leads EPIC's water team of 14 people across the country developed the organization's work on lead service line replacement, including launching the Lead-Free Water Challenge in 2021 to deliver pro bono technical assistance to help communities replace lead service lines. She has published extensively on lead service line replacement, including a recent report on best practices. Since 2022, she has helped EPIC fundraise for and launch the Funding Navigator Program to deliver technical assistance to disadvantaged communities around the country, including helping EPIC become an EPA-selected a national Environmental Finance Center.

Brent Fewell, WFX

Regionalization Finance Strategist

Brent is an environmental lawyer and former corporate executive and senior U.S. EPA official in EPA's Offices of Water and Congressional and Intergovernmental Relations. As Co-Founder, General Counsel and Business Development Lead of WFX, he routinely works with water and wastewater utilities, advising on governance and compliance related matters. He also co-chairs the Water Ad Hoc Group, composed of all the national water and wastewater associations, aimed at advocating for additional funding and policy reform to increase the sustainability and resilience of water utilities across the nation.

Samir Amin, DAAR

Construction Lead

Prior to joining DAAR as Global and Land Development Engineering Services Manager, Samir spent 32 years with the City of Milwaukee in the Public Works Department. During his tenure as City Engineer, the City of Milwaukee created a stand-alone lead lateral replacement program that accounted for the removal of 5,808 lead lateral services since 2017. As City Engineer, he coordinated the City of Milwaukee's annual infrastructure plans (the largest infrastructure program in the State of Wisconsin) by working with sewer and water utilities to determine which road reconstruction projects would include new water services in which areas of the city.

Corina Norrbom, MD, H2N

Community Outreach Manager

Corina is a physician, an Assistant Professor at the Medical College of Wisconsin-Central Wisconsin and the Project Director of Hmong and Hispanic Communication Network (H2N). With a central focus on community through her wide variety of roles, Corina was a driving force in the formation of H2N during the COVID-19 pandemic, focused on strengthening communication channels and facilitating regular information exchange between public health/health systems/resource agencies and people in the Hmong and Hispanic communities.

Kent Miller, LIUNA

Worforce Planning Strategist

Kent is the President/Business Manager of the Wisconsin Laborers' District Council and a third-generation member of LIUNA. He brings extensive experience in the sewer and water industry. In 2012, Kent was hired as an organizer before becoming Assistant Business Manager of the Wisconsin Laborers' District Council in 2015. In 2018, Kent was also appointed to serve as the LIUNA International Representative for Wisconsin and in 2022, Kent became the President/Business Manager of the Wisconsin Laborers' District Council. Kent is a member and co-chair of the DWD Construction Craft Laborer State Apprenticeship Advisory Committee, the Chairman of the Wisconsin Laborers' health and pension funds and sits on the executive boards of the Wisconsin State AFL-CIO and the Wisconsin State Building Trades Council.

KEY PERSONNEL ORGANIZATIONAL CHART

As shown on the organizational chart, **Figure 1.3** at the end of this section, there are two primary functions of the Program, one is strategic and the other is operational, with both components being fully interdependent and governed by an Executive Steering Committee ("ESC"). The ESC, further described below, ensures there is continuous alignment toward the achievement of Program goals and objectives.

Executive Steering Committee

The ESC is responsible for Program governance and is the key decision-making body for the Program. Post-award, the City and CIP will determine the composition of the Committee in addition to establishing the meeting cadence (which is

typically quarterly) and other protocols. Our recommendation would be that at a minimum, both the Mayor and the Director of Public Works serve on the ESC, along with Shawn Kerachsky (Program Executive), Pete Littleton (Implementation Lead), and someone from the City Council and/or the Water Commission. There may also be a desire to supplement the Committee with one or more representatives from the community, either directly or through the community outreach firms. Either way, the ESC composition is customizable at the discretion of the City.

Strategic Team

The strategic team is led by Shawn Kerachsky as Program Executive and is responsible for developing and executing a strategy that algins to the goals of the Program as well as Program oversight. Key strategic focus areas will include methods for scaling a Program that goes from Wausau's current replacement volume of 90 lead service lines ("LSLs") annually to 8,000 LSLs over the course of the five-year program by maximizing funding through BIL as well as other state, federal and philanthropic sources, with an emphasis on garnering as much grant funding and principal forgiveness as possible. As a result, the strategic team has representation from the funding and financing side as well as public policy, public health and regionalization—all disciplines that have the ability to drive scalability as well as attract other potential sources of capital.

Operations Team

The operations team is led by Pete Littleton as Implementation Lead and has the sole responsibility for development and execution of each year's annual plan. The implementation plan will be established collaboratively and blessed by the ESC and presumably aligned with the available funding. Upon the implementation plan being approved, the operations team will determine the number, location, and amount of lines to be replaced. The tactics required to execute the implementation plan include community outreach, workforce development, bidding out the work, oversight of the work, tracking and testing, reporting and post-change out certification.

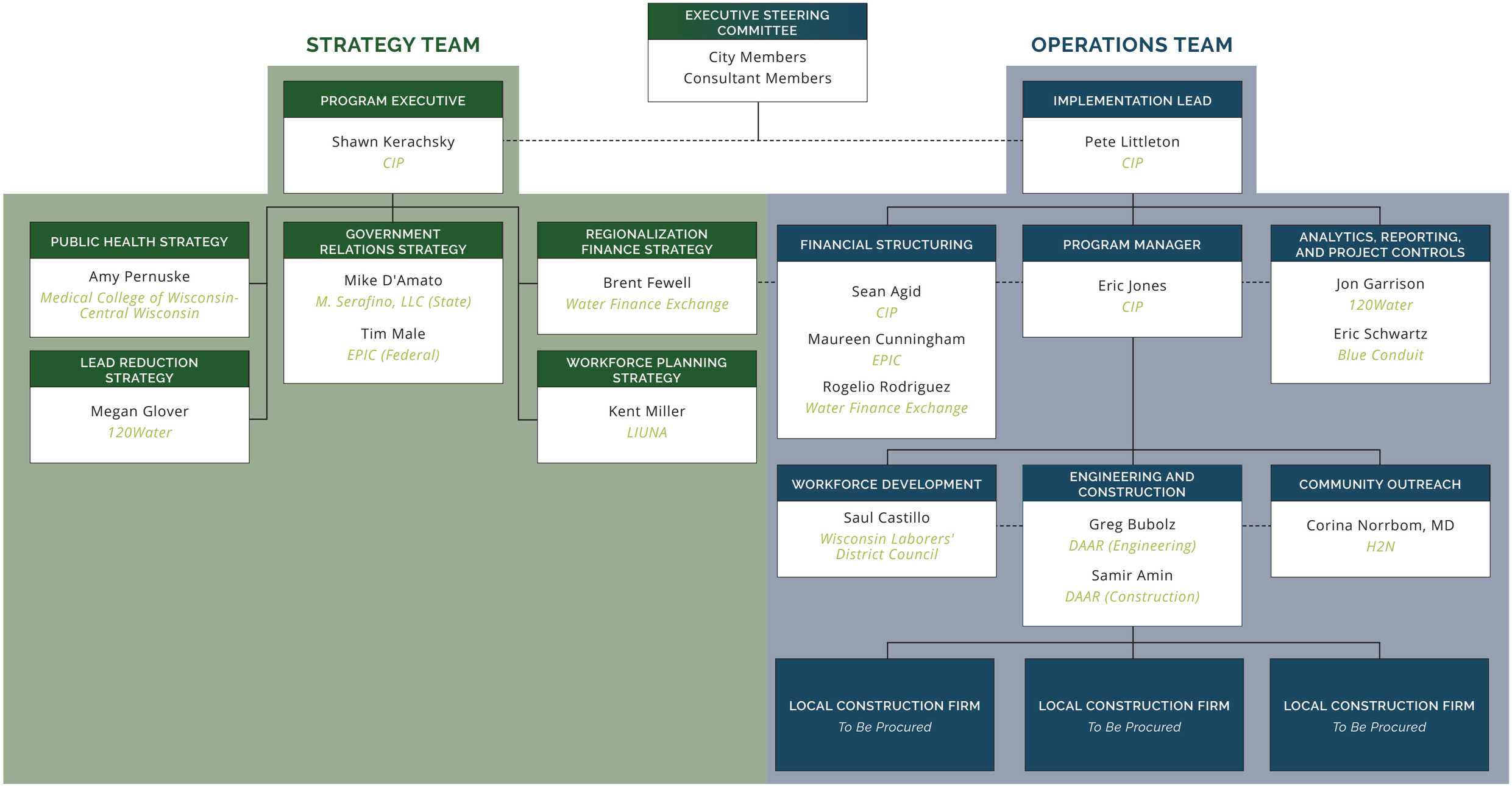
Interdependency

Given the brief description of each of the three bodies of the Program, one can see the natural, organic way that they work together:

- The ESC establishes the overall vision and objectives, as well as the KPIs that govern the Program;
- The strategic team develops the strategy to achieve those KPIs; and
- The operations team executes the strategy by implementing each year's projects.

It is important to recognize, however, that this is not a top-down structure. There is constant interplay between all three groups as nothing remains static over the duration of the Program. Whether it's due to seismic events such as COVID, or financial events like a recession, or the downstream impacts of inflation, any number of variables can impact the ability to execute on an annual plan in any given year that may require changes in strategy, which in turn, require decisions and approval from the ESC. There may also be instances where the Program gets supplemental funding, and although that is an objective of the funding/financing side of the strategic team, it also triggers a number of actions, the least of which involves identifying additional contractors, bidding of work, modifications to schedule, ramping up outreach, etc. In short, the Program and how it runs both strategically and operationally is dynamic at all times, requiring both an active, involved and informed ESC as well as a fully integrated team across all three functions.

Figure 1.3: Key Personnel Organizational Chart



2

RELEVANT EXPERIENCE

RELEVANT EXPERIENCE

As introduced in **Section 1: Project Team**, CIP's leadership team offers more than 40 years of collective experience leading the development of large-scale infrastructure projects and the implementation of CBP3s, including the only three operational CBP3s to date (the Clean Water Partnership, the Fresh Coast Protection Partnership, and the Chester, PA CBP3). The performance-based structure of a CBP3 requires the successful integration of multiple disciplines and components of a program in order to drive innovation and efficiency, accelerate development, and deliver meaningful community and economic benefits. For that reason, it is essential that CIP, as Consultant and CBP3 developer, has the experience and capabilities necessary to plan and understand all aspects of the Program—planning, engineering, construction, community outreach, workforce development, public health, government relations, project controls and reporting, and financing. In this integrated fashion, CIP is able to guide all members of the Program's multi-disciplinary team in a coordinated manner, with the best value of the full Program solution remaining paramount in every decision. This integrated expertise helps ensure the CIP team properly identifies the risks and opportunities of the Program, and then efficiently coordinates and structures the financial plan and technical solution into an optimized whole.

Beyond integration, successful collaboration and Program implementation often comes down to the Key Personnel who are leading program efforts. The individuals proposed for the Program are highly accustomed to working within broad and diverse teams and know how to successfully collaborate to achieve a best value, community-oriented solution for the City. Furthermore, many of the individuals across the different firms have worked with each other before on successful projects. An organizational chart reflecting the structure and roles of Key Personnel is provided at the end of the previous section, **Section 1: Project Team**, and details regarding our Key Personnel's relevant experience is provided in the resumes on the following pages.

Fresh Coast Protection Partnership

Greater Milwaukee, WI

The Fresh Coast Protection Partnership was the first CBP3 in the state of Wisconsin and the first full-risk transference CBP3 that included the design, build, financing, operations and maintenance of a portfolio of green stormwater infrastructure projects across 19 municipalities in the Greater Milwaukee region. The structure of the CBP3 mitigated all delivery risk away from Milwaukee Metropolitan Sewerage District as the utility didn't pay anything until projects were fully implemented and independently certified. This structure set a precedent for future CBP3s including the Seattle Public Utilities CBP3 which issued an RFP for a CBP3 with a similar risk transference structure. CIP's Key Personnel assembled a team of local and national leaders to help Milwaukee Metropolitan Sewerage District achieve its 2035 vision to capture 750 million gallons of stormwater runoff through green infrastructure. Approximately 90% of projects were on private property, enabling the District to build high-value projects on property they didn't previously have access to.

Company

CIP

Years of Experience

28+

Education

BA, Geography (Urban Planning), Clark University

Community Involvement

Board of Trustees, Rocky Hill Country Day School
2019 - Present

Youth Coach, East Greenwich Soccer Association
2012 - Present

Main Street Advisory Group, Clark University P3
2022 - Present

SHAWN KERACHSKY

Program Executive

Introduction

As Co-Founder and CEO of CIP, Shawn is responsible for establishing corporate strategy, developing new business, and managing day-to-day operations. With more than 28 years of experience, seven of which have been dedicated solely to working on CBP3s and traditional P3s, Shawn has been instrumental in structuring and executing the nation's first CBP3s as well as multiple traditional public-private partnerships. In his role as CEO, Shawn educates policy makers, industry leaders, and project owners about new approaches to efficiently deliver programmatic infrastructure solutions while maintaining an emphasis on community engagement and economic development. He focuses on developing collaborative relationships and implementing proven management strategies for multi-disciplinary teams to ensure client and community objectives are achieved under the CBP3 delivery model.

Prior to founding CIP, Shawn was the Managing Director of the Community-Based Partnership ("CBP") unit for a US-based infrastructure developer. In this role, he oversaw the successful management and operations of the company's existing portolfio which included the first-ever CBP3, the Clean Water Partnership with Prince George's County, Maryland, while establishing new business opportunities and relationships.

Relevant Experience

The Clean Water Partnership

Prince George's County, MD

Managing Director | 2020-2022*

Beginning in 2020, Shawn served as the Managing Director for the Clean Water Paternship ("CWP"), a first-of-its-kind CBP3 with Prince George's County, Maryland ("the County") to address large-scale stormwater management. The project involved county-wide planning, green infrastructure, and low-impact development practices to treat runoff from 4,000 acres. The three phases of the Clean Water Partnership ("CWP") included approximately $350 million in infrastructure installation projects plus $167 million in operations and maintenance scope. A robust community outreach and stakeholder engagement took place, coordinating more than 100 events and meetings to generate stakeholder buy-in, public awareness and education, and recruit local and minority-owned businesses. Additionally, a mentor protégé program was created to provide training and resources to firms that weren't qualified in green stormwater infrastructure, such as landscaping firms.

SHAWN KERACHSKY | Program Executive

Stormwater Authority of Chester CBP3

Chester, PA

Managing Director | 2020 – 2022*

Shawn served as the Managing Director for the 30-year CBP3 with the Stormwater Authority of the City of Chester (the "Authority"). The CBP3 included the planning, financing, implementation, and maintenance of nearly $50 million in green and gray stormwater infrastructure. The program enabled the Authority to address significant pollution and flooding issues, improve neighborhood quality of life, assist small minority-owned businesses, and drive economic growth, including significant job creation and cost savings to water and other public and private capital improvement efforts in the region.

Fresh Coast Protection Partnership

Greater Milwaukee, WI

Managing Director | 2020 – 2022*

As Managing Director, Shawn was responsible for providing executive leadership and oversight of the Fresh Coast Protection Partnership, the first full-risk transference CBP3 that included the design, build, financing, operations and maintenance of a portfolio of green stormwater infrastructure projects across 19 municipalities in the Greater Milwaukee Region. The structure of the CBP3 mitigated all delivery risk away from Milwaukee Metropolitan Sewerage District as the utility didn't pay anything until projects were fully implemented and independently certified. This structure set a precedent for future CBP3s including the Seattle Public Utilities CBP3 which issued an RFP for a CBP3 with a similar risk transference structure.

Seattle Public Utilities RainCity Partnership CBP3

Seattle, WA

Managing Director | 2021 – 2022*

Shawn led a team of CBP3 experts and water infrastructure professionals to develop a proposal and was ultimately awarded a contract for the Seattle Public Utilities' ("SPU") RainCity Partnerships CBP3. The CBP3 was broken into two phases; Phase 1 was a $15-million green stormwater infrastructure program throughout specific areas within Seattle which was expected to grow into a larger, $100-million or greater Phase 2. The CBP3 consisted of four tasks: program management, community benefit outcomes, GSI project installation, and operations and maintenance. A goal of the program was to help ensure SPU's capital investments in stormwater management and water quality deliver excellent drainage and wastewater system value to ratepayers, as well as other community-driven benefits. Under Shawn's leadership, the team had the expertise to significantly increase the pace of implementation while intentionally building new avenues for BIPoC communities.

** Denotes project experience prior to CIP*

Company

CIP

Years of Experience

25+

Education

Business Management, Mercer University

Licenses & Certifications

OSHA 30-Hour Certification

Certified Storm Water Inspector, NPDES

PETE LITTLETON

Implementation Lead

Introduction

As CIP's Chief Operations Officer, Pete brings more than 25 years of experience in project development and is a pioneer in establishing and operating large-scale green and grey stormwater infrastructure programs across the United States. His experience includes leading the planning, delivery, and management of all three operational CBP3s in the country: the Clean Water Partnership in Prince George's County, Maryland, the Fresh Coast Protection Partnership in Milwaukee, Wisconsin, and the Chester, Pennsylvania CBP3.

Pete is recognized for his ability to build dynamic program teams consisting of local design, contracting, maintenance, and communications firms as well as NGOs and community-based organizations to maximize community benefits for each partnership. Key to the success of each program, he is highly knowledgeable on how best to ensure all design and construction activities are not only executed on time and on budget, but within the parameters of the governing performance metrics of each program, and in which compensation is directly tied.

Relevant Experience

The Clean Water Partnership

Prince George's County, MD

Senior Operations Manager | 2015-2022*

Pete served as the Senior Operations Manager for this first-of-its-kind, 30-year, $100-million CBP3 with Prince George's County, Maryland ("the County") to address large-scale stormwater management. The project involved county-wide planning, green infrastructure, and low-impact development practices to treat runoff from more than 5,000 acres. The three phases of the Clean Water Partnership ("CWP") included approximately $350 million in infrastructure installation projects plus $167 million in operations and maintenance scope. As Senior Operations Manager, Pete was the main point of contact and accountability for the partnership, communicating regularly with County staff, stakeholders, and the community to effectively implement the program. The program was ultimately delivered using County residents and small, local and minority-owned businesses. Under Pete's leadership, robust community outreach and stakeholder engagement took place, coordinating more than 100 events and meetings to generate stakeholder buy-in, public awareness and education, and recruit

local and minority-owned businesses. A mentor protégé program was also created to provide training and resources to firms that weren't qualified in green stormwater infrastructure, such as landscaping firms. During Pete's tenure, approximately 40 firms graduate through six cohorts—all having opportunities to work within the CWP to ultimately grow their businesses and keep the County's investment local.

Stormwater Authority of Chester CBP3

Chester, PA

Implementation Lead | 2017 – 2022*

Pete led the delivery and operations of this innovative CBP3 with the Stormwater Authority of Chester (the "Authority"). The CBP3 included the planning, financing, implementation, and maintenance of nearly $50 million in green and gray stormwater infrastructure. The program enabled the Authority to address significant pollution and flooding issues, improve neighborhood quality of life, assist small minority-owned businesses, and drive economic growth, including significant job creation and cost savings to water and other public and private capital improvement efforts in the region. As Implementation Lead, Pete was the main point of contact and accountability for the partnership, responsible for all aspects of project delivery including managing a multi-disciplinary team of outreach, design, and construction management staff.

Fresh Coast Protection Partnership

Greater Milwaukee, WI

Implementation Lead | 2019 – 2022*

Pete was accountable for the delivery of the Fresh Coast Protection Partnership, the first full-risk transference CBP3 that included the design, build, financing, operations and maintenance of a portfolio of green stormwater infrastructure projects across 19 municipalities in the Greater Milwaukee Region. Pete assembled a team of local and national leaders to help Milwaukee Metropolitan Sewerage District achieve its 2035 vision to capture 750 million gallons of stormwater runoff through green infrastructure. While Pete managed the program, approximately 90% of projects were on private property, enabling the District to build high-value projects on property they didn't previously have access to.

San Fernando Valley Green Street Program

Los Angeles, CA

Implementation Lead | 2019 – 2022*

Pete served as the Implementation Lead for a network of green streets in the San Fernando Valley region of Los Angeles. This project was implemented using a Progressive Design Build delivery model with more than a dozen vendors and subcontractors. At the completion of the construction, more than 50% of the companies that work on the program were a certified small and/or minority-owned business and more than 50% we local to Los Angeles County. Upon completion, the American Society of Civil Engineers Metropolitan Los Angeles Branch awarded this project the Outstanding Roadway and Highway Project of the year recognizing it for environmental improvements and economic impact.

** Denotes project experience prior to CIP*

Company

CIP

Years of Experience

10+

Education

MPS, Real Estate Finance, Georgetown University

BS, Business Administration, University of Rhode Island

Hasbro Continuous Learning Scholarship, Zhejiang University, Hangzhou China

SEAN AGID

Financial Structuring Co-Lead

Introduction

Sean is the Co-Founder and Chief Business Officer of CIP, offering more than 10 years of experience leading traditional public-private partnership ("P3") and CBP3 projects. His experience includes the project planning, structuring, closing, and/or ongoing delivery oversight of infrastructure projects totaling more than $300 million in value to date. These diverse projects have been delivered under a range of procurement and commercial structures and include an array of asset types, from military and student housing to water infrastructure, renewable energy and other climate-focused developments. Part of his responsibilities as Chief Business Officer include educating policy makers, industry leaders, and project owners about new approaches to efficiently deliver infrastructure at scale.

Prior to founding CIP, Sean was the Director of Partnerships and Financial Structuring for a US-based infrastructure developer focused on P3 and CBP3 projects. One of his key accomplishments in this role was serving as an integral member of the leadership team responsible for the planning and execution of the first-ever CBP3, the Clean Water Partnership with Prince George's County, Maryland. Since that time, he has continued to play an essential part in advancing the CBP3 delivery model, including acting as the finance lead for such notable projects as the Chester, PA CBP3 and the Fresh Coast Protection Partnership in Milwaukee, WI.

Relevant Experience

The Clean Water Partnership

Prince George's County, MD

Finance Lead | 2015-2022*

Sean served as the Finance Lead for this first-of-its-kind, performance-based, 30-year, $500-million CBP3 with Prince George's County, Maryland ("the County") to address large-scale stormwater management across 24 municipalities. The project involved county-wide planning, green infrastructure, and low-impact development practices to treat runoff from more than 5,000 acres. The financial and commercial structure used for the partnership enabled the County to retain control of assets, investments, and prioritization of the full program of work while executing large scopes of work that can take advantage of low-cost financing options offered by a State Revolving Fund ("SRF"). The model leverages County resources including residents and small, local and minority-owned businesses to implement the majority of the work.

SEAN AGID | Financial Structuring Co-Lead

Stormwater Authority of Chester CBP3

Chester, PA

Finance Lead | 2017 – 2022*

Sean led the financing and commercial structuring of the 30-year CBP3 with the Stormwater Authority of the City of Chester (the "Authority"). The CBP3 included the planning, financing, implementation, and maintenance of nearly $50 million in green and gray stormwater infrastructure. The program enabled the Authority to address significant pollution and flooding issues, improve neighborhood quality of life, assist small minority-owned businesses, and drive economic growth, including significant job creation and cost savings to water and other public and private capital improvement efforts in the region. Sean worked to secure public financing, including a $1 million planning/pre-construction grant from PENNVEST, Pennsylvania's infrastructure investment authority, and more than $150,000 in technical and planning assistance from the US EPA.

Fresh Coast Protection Partnership

Greater Milwaukee, WI

Finance Lead | 2019 – 2022*

Sean was responsible for the financial and commercial structuring of the Fresh Coast Protection Partnership, the first full-risk transference CBP3 that included the design, build, financing, operations and maintenance of a portfolio of green stormwater infrastructure projects across 19 municipalities in the Greater Milwaukee Region. The structure Sean helped develop, mitigated all delivery risk away from Milwaukee Metropolitan Sewerage District as the utility didn't pay anything until projects were fully implemented and independently certified. This structure set a precedent for future CBP3s including the Seattle Public Utilities CBP3 which issued an RFP for a CBP3 with a similar risk transference structure.

San Fernando Valley Green Street Program

Los Angeles, CA

Finance Lead | 2019 – 2022*

Sean served as the Finance Lead for a network of green streets in the San Fernando Valley region of Los Angeles. This project was implemented using a Progressive Design Build delivery model. Geosyntec was the on-call consultant who led the design of the project while Sean worked closely with them to develop a structure that allowed for small and minority-owned businesses to get paid prior to receiving payment from Los Angeles Sanitation, ultimately reducing the financial burden on these businesses. Upon completion, the American Society of Civil Engineers Metropolitan Los Angeles Branch awarded this project the Outstanding Roadway and Highway Project of the year recognizing it for environmental improvements and economic impact.

Seattle Public Utilities RainCity Partnership CBP3

Seattle, WA

Finance Lead | 2021 – 2022*

Sean developed a full risk-transference financing structure for the Seattle Public Utilities' ("SPU") RainCity Partnerships CBP3 where the private sector would build green stormwater infrastructure and get paid a fixed price only upon completion. Any cost overruns would become the responsibility of the private sector to ensure Seattle was only paying for guaranteed results. The CBP3 was broken into two phases; Phase 1 was a $15-million green stormwater infrastructure program throughout specific areas within Seattle which was expected to grow into a larger, $100-million or greater Phase 2. The CBP3 program consisted of four tasks: program management, community benefit outcomes, GSI project installation, and operations and maintenance.

* *Denotes project experience prior to CIP*

Company

CIP

Years of Experience

10+

Education

MS, Geodesign,
Philadelphia University

BS, Geology,
University of Mary Washington

ERIC JONES

Program Manager

Introduction

Eric's career has given him insight into many of the various sides of urban development and planning. Initially working on construction sites as a third-party inspector, Eric gained valuable project manager experience including reading site plans, scheduling milestone events, and maintaining client relations. Over the years and through academic and professional CBP3 experience, Eric has developed these skills and added a whole list of others, including geospatial analysis, database management, outreach, budget planning, plant care, noxious weed and pest control, and green and grey stormwater infrastructure maintenance.

In his recent roles as first Maintenance Coordinator and then Program Manager for the Clean Water Partnership, Eric showed a great aptitude for working with designers, contractors, clients, and the public alike to develop a successful program with good community standing and highly capable delivery partners. Eric believes that building resilient infrastructure with local workforce is an incredibly effective way to create a stronger economy and sustainable communities.

Relevant Experience

The Clean Water Partnership

Prince George's County, MD

Program Manager | 2020-2022*

Eric served first as Maintenance Coordinator and later as Program Manager for this first-of-its-kind, 30-year, $100-million CBP3 with Prince George's County, Maryland ("the County") to address large-scale stormwater management. The project involves county-wide planning, green infrastructure, and low-impact development practices to treat runoff from more than 5,000 acres. The three phases of the partnerships included approximately $350 million in infrastructure installation projects plus a $167 million in O&M scope.

Building projects to treat more than 5,000 impervious acres in six years has a number of challenges, and adding the requirement to do so with local-based businesses added an additional level of complexity. As Program Manager during Phase III, Eric prioritized the development of small local businesses through training, increasing bid opportunities, and pro-active communication. This philosophy helped develop a strong core of local contractors and designers which exceeded the programs KPIs and client's expectations with an average of over 75% Target Class Participation and over 50% Resident Participation.

ERIC JONES | Program Manager

The Clean Water Partnership

Prince George's County, MD

Maintenance Coordinator | 2017-2020*

Prior to serving as Program Manager, Eric was the Maintenance Coordinator and and was responsible for creating the CWP maintenance program, planning and coordinating all routine and functional maintenance of stormwater devices managed by the Clean Water Partnership ("CWP"). The CWP maintains new and dated devices, totaling more than 400 assets needing to be kept to functional standards on an operations budget of nearly $3 million dollars. All maintenance of the more than 400 assets was scheduled and overseen through a cloud-based asset management system that Eric set up, ran, and trained partners to use. Maintenance contractors were trained on technology for logging reports and how to upkeep stormwater management devices effectively and efficiently. Much of this training was developed by Eric and his staff and was used to build the capacity of small local businesses. As Maintenance Coordinator, Eric was also responsible for ongoing outreach around projects. He attended many community meetings, generated outreach documents, edified residents, and set up a hotline to quickly gather and address public concerns and ensure community satisfaction.

Stormwater Authority of Chester CBP3

Chester, PA

Program Manager | 2020 – 2022*

Eric served as the Program Manager CBP3 with the Stormwater Authority of Chester (the "Authority"). The CBP3 included the planning, financing, implementation, and maintenance of nearly $50 million in green and gray stormwater infrastructure. The program enabled the Authority to address significant pollution and flooding issues, improve neighborhood quality of life, assist small minority-owned businesses, and drive economic growth, including significant job creation and cost savings to water and other public and private capital improvement efforts in the region. As Implementation Lead, Pete was the main point of contact and accountability for the partnership, responsible for all aspects of project delivery including managing a multi-disciplinary team of outreach, design, and construction management staff.

GreenUP/AKRF

Philadelphia, PA

Foreman | 2016 - 2017*

Eric led a work crew in the operations and maintenance of Philadelphia Water Department's ("PWD") green stormwater infrastructure. He oversaw the integration of all operations and maintenance activities on official PWD intranet software. Eric's responsibilities included the routine care of green stormwater management devices, storm drain hardware, gardens and plants, interfacing with the public stakeholders, training new staff, data collection, maintaining crew safety and condition of tools and work vehicle.

** Denotes project experience prior to CIP*

Company

120Water

Years of Experience

20+

Education

BA, Communication Arts and Sciences, DePauw University

Professional Affiliations

Board Member, Indiana Technology & Innovation Association
2018 - Present

Cabinet Member, Governors Workforce Development Cabinet
2019 - Present

Board Member, Zionsville Education Foundation
2017 - 2020

MEGAN GLOVER

Lead Reduction Strategist

Introduction

Megan is the founder and CEO of 120Water. She is responsible for creating the industry leading playbooks and executing many of the Country's most prominent lead reduction and replacement programs including: City of Chicago, State of Indiana, Pittsburgh Water and Sewer Authority, Newark, Denver Water. Under Megan's leadership, 120Water's platform works with 12 state regulatory agencies and more than 3,000 water systems across the country to execute all of the lead programs related to LCRR. She is also an Inaugural Member of the White House's Get the Lead Out Partnership.

Relevant Experience

Denver Water LSLR & Pitcher/Filter Program

Denver, CO

Program Executive | 2019 - Ongoing

Denver Water has partnered with 120Water to distribute 150,000 pitchers and 750,000 filters over a three-year period. 120Water is managing the shipping, analysis, and results distribution for 40,000 pre and post LSL replacement sampling kits, and distribution of more than 150,000 Pitchers/Filters. Megan provided executive oversight and worked closely with Jon Garrison, liaising with and managing the Mott Macdonald, Denver Water, and 120Water teams as well as various suppliers and logistics partners to ensure the executional excellence of both programs.

City of Newark LSL Replacement Program

Newark, NK

Program Executive | 2018 - 2021

The City of Newark found it difficult to educate the community about the importance of the LSL replacement project and solicit their engagement in its ultimate success. To increase public awareness and involvement in the program, Newark partnered with 120Water in three key areas: post-replacement program management, sample kits, and resident communication. 120Water's services team, in conjunction with its partner network, was able to develop unique communications materials to inform residents of the project. By utilizing 120Water's EPA-approved, ready-to-ship kits and a lab partner network prepared to process thousands of samples, Newark saved themselves a significant logistical headache.

Company

120Water

Years of Experience

20+

Education

English and Literature, Butler University

Marketing and Computer Science/Information Systems, Anderson University

JON GARRISON

Analytics, Reporting, and Project Controls Co-Lead

Introduction

Jon has been with 120Water since its founding, serving as an account manager, senior program consultant, and client success leader delivering executional excellence in water and wastewater programs for the company's largest and most strategic clients. Bringing nearly 20 years of experience as a technology project manager, Jon effectively and efficiently guides clients, delivers project results, and provides programmatic solutions to the problems they are facing. As the Analytics, Reporting, and Proejct Controls Co-Lead on the Program, Jon will work hand-in-hand with the City of Wausau, CIP, and the internal 120Water team to ensure the successful execution of every aspect of the programmatic scope that comprises the Program.

Relevant Experience

Denver Water LSLR & Pitcher/Filter Program

Denver, CO

Program Consultant | 2019 - Ongoing

Denver Water has partnered with 120Water to distribute 150,000 pitchers and 750,000 filters over a three-year period. 120Water is managing the shipping, analysis, and results distribution for 40,000 pre and post LSL replacement sampling kits, and distribution of more than 150,000 Pitchers/Filters. Jon served as the primary Program Consultant from 120Water, liaising with and managing the Mott Macdonald, Denver Water, and 120Water teams as well as various suppliers and logistics partners to ensure the executional excellence of both programs.

Illinois American Water Lead Service Line Inventory

50 Public Water Systems in Illinois

Program Consultant | 2021 - 2022

Illinois American Water partnered with 120Water to inventory their service lines across 50 Public Water Systems in Illinois. This includes public outreach and communications, data management of all inventory data, and updating LCR tier sites according to new IL State standards. As the Program Consultant, Jon oversaw all day-to-day operations of the program, coordinating with the engineering

partner consultants to drive validation work and ensure timely fulfillment of expected programmatic deliverables. He also managed the software implementation and ongoing data management elements of the program.

Providence Water / LCR, Customer Request, LSLR Program

Providence, RI

Program Consultant | 2018 - Ongoing

Providence Water purchased the 120Water LCRR application as its modern "Lead Database" to manage data for all of its lead programs and to move to a cloud-based commercial off the shelf software from a legacy custom database that had become difficult and risky to maintain. Providence currently uses the 120Water Platform & 120Water Project/Data Management team to execute their Compliance, LSL Replacement, and Customer Request sampling programs, including: sample distribution, collection, analysis, results distribution, and reporting to internal and primacy agency stakeholders. Serving as the Program Consultant, Jon was responsible for working directly with Providence, overseeing the implementation & overall successful execution of all three sampling programs.

PWSA / LCR, LSLR, Customer Request, Pitcher/Filter Program

Pittsburgh, PA

Program Consultant | 2016 - Ongoing

PWSA reduced cost and saved staff time by implementing 120Water to fulfill customer needs. They were able to keep up with LCR requirements and maintain a centralized database for LSL inventory & replacement. They brought water testing turnaround time down from 4 months to 14 days, saved 80% on sample kits, and enabled 24 hour notifications of results. As the Program Consultant, Jon worked directly with PWSA to ensure seamless and successful implementation and execution of their various compliance-based water quality programs, including lead and copper rule compliance, customer request & LSLR sampling, and pitcher filter logistics, and data management.

Indiana Finance Authority (IFA) / Lead Sampling in Schools and Daycares

Indianapolis, IN

Program Consultant | 2016 - Ongoing

The Indiana Finance Authority ("IFA") has been using 120Water's Lead in Facilities application since 2017, as well as managed services and kits, to standardize and manage all of the data, reporting, and sampling logistics for their statewide lead testing in schools program. The software application is used to aggregate unique facility data including metadata for each school/childcare facility fixture across nearly 2,000 facilities, and report sample results and tracking remediation actions at the facility, district, and state levels. Data for over 65,000 samples is managed and housed in the application, and inputted through a standardized intake process, including validation of laboratory data from multiple lab vendors using 120Water's EDD CSV template. In addition, 3rd party field service partners create sample plans and collect samples with guided software use and training from 120Water. As the Program Consultant, Jon was responsible for managing the Lead in Facilities sampling program under the guidance of the Indiana Finance Authority. He worked directly with participating facilities, training them on how to leverage the 120Water platform to create sampling plans, collect samples, and review/distribute results.

Company

EPIC

Years of Experience

25+

Education

PhD, Conservation Biology, University of Hawaii

BS, Biology, Yale University

Professional Affiliations

Advisory Committee, Bay Restoration Fund
2022 to present

Advisory Board Member, Chesapeake Conservation Partnership
2019 to present

Former City Council Member, Takoma Park, MD
2011-2017

TIM MALE

Government Relations Strategist (Federal)

Introduction

Tim founded the Environmental Policy Innovation Center (EPIC) in 2017 and is now Executive Director. He has led the organization through a period of incredible growth and opportunity, raising over $22 million over the last three years and expanding the number of staff to nearly 30. He advises on all programmatic work and key organizational partnerships. He is passionate about replacing lead pipes, and co-authored EPIC's report, Replacing Toxic Lead Pipes Faster, which included examples of Public Private Partnerships as a potential for lead service line replacement, as well as an op-ed.

Prior to launching EPIC, he served as an Associate Director at the White House Council on Environmental Quality, where he directed a team in the Executive Office of the President (EOP) responsible for policy and program initiatives in private investment, drinking water infrastructure and technology, data, drought, California water issues, water use efficiency, finance, renewable energy permitting, wildlife trafficking, endangered species, agriculture, wildfire, and other conservation priorities. He provided leadership on the following policy achievements for the Administration: a Presidential Memorandum on Mitigation and Related Private Investment; an Announcement of $2 billion in private sector, for-profit conservation investments; a Presidential Memorandum on Drought Resilience; and an Executive Order on Invasive Species and Public Health.

Tim also served as Vice President for Conservation Policy at Defenders of Wildlife, Director at National Fish and Wildlife Foundation, and Co-Director of Agriculture Policy at Environmental Defense Fund. He holds degrees in science from Yale University and the University of Hawaii. His writing has appeared in the Wall Street Journal, Washington Post, Science magazine and a diversity of peer-reviewed journals. He has received a Marshall Memorial Fellowship and AAAS Science and Technology Policy Fellowship (declined). He also ran for office and won, serving three terms as a City Councilmember in Takoma Park, MD and leading the successful effort for that city to become the first in the country to lower its voting age to 16.

TIM MALE | Government Relations Strategist (Federal)

Relevant Experience

Lead-Free Water Challenge

Chelsea, MA; Newburgh, NY; Hazel Crest, IL; Fairmont, MN

Strategic Advisor | 2021 - Ongoing

In a pilot program launched in 2021 called the "Lead-Free Water Challenge", EPIC along with key partners (Blue Conduit, Center for Geospatial Solutions, and WaterPIO) and a growing list of others, including the Newburgh Clean Water Project, 120Water, and GHD, offered free technical assistance to six initial municipalities to help jumpstart their lead service line replacement programs. Tim has been a key strategic advisor on this project to assist communities with lead service line replacement.

Funding Navigator

Midwest; Mid-Atlantic; South: Nationwide

Strategic Advisor | 2022 – Ongoing

Tim served as a Strategic Advisor for EPIC's Funding Navigator project, which has the goal of ensuring more communities, particularly those that are overburdened, benefit from government investments in safe and climate-resilient drinking water, lead service line replacement, wastewater treatment, and stormwater management. EPIC has conducted outreach to more than 70 communities to date, with 40 communities in the pipeline for further work and/or a gap analysis to determine next steps.

Company

EPIC

Years of Experience

25+

Education

MS, Environmental Management, Yale School of the Environment

BA, International Studies, American University School of International Service

Professional Affiliations

Organizational Member, Lead Service Line Replacement Collaborative
2021 - Present

Advisory Board Member, Blue Conduit Charitable Fund
2021 - Present

Council Member, Town of Bethlehem, NY
2018 - Present

MAUREEN CUNNINGHAM

Financial Structuring Co-Lead

Introduction

Maureen directs EPIC's broader policy, data and research, engagement, and technical assistance work on water infrastructure and water equity, as well as strategy and organizational development. When she started at EPIC in 2020, she was the second staff member on the water team; she now leads EPIC's remote water team of 14 people who are engineers, community advocates, policy analysts, data scientists, and current/former elected officials. Maureen helped develop the organization's work on lead service line replacement, including launching the Lead-Free Water Challenge in 2021 to deliver pro bono technical assistance to help communities replace lead service lines. She has published extensively on lead service line replacement, including a recent report on best practices. Since 2022, she has helped EPIC fundraise for and launch the Funding Navigator Program to deliver technical assistance to disadvantaged communities around the country, including helping EPIC become an EPA-selected a national Environmental Finance Center. She leads EPIC's work in delivering policy support and technical advisory in lead service line replacement for the Great Lakes and St. Lawrence Cities Initiative member cities. She is part of a committee advocating for the White House Get the Lead Out Partnership, which launched in January 2023. She oversees EPIC's work on tracking federal funding through the Drinking Water State Revolving Funds, and tracking lead service line replacement rates.

Prior to her work at EPIC, she served as Senior Director for Clean Water at Environmental Advocates New York, where she championed statewide water policies and legislation, including successfully advocating for tougher state regulations on emerging contaminants in drinking water, leading a statewide coalition on water access, and helping raise the voices of communities on the frontlines of water contamination to state policymakers. Maureen also served as Executive Director of the Hudson River Watershed Alliance for several years, strengthening the capacity of dozens of grassroots groups to protect their water resources and building climate resilience in Hudson Valley communities. Prior to her work on water policy and management, she worked internationally, including for Rare in Washington, DC, where she led community-based conservation initiatives in several countries in partnership with UNESCO and the United Nations Environment Programme. Based in Upstate New York with her husband and two sons, Maureen is serving a second term as an elected Councilmember in her town of 35,000 outside of Albany. She speaks Spanish and French, and is a trained community facilitator.

Relevant Experience

Lead-Free Water Challenge

Chelsea, MA; Newburgh, NY; Hazel Crest, IL; Fairmont, MN

Project Manager | 2021 - Ongoing

In a pilot program launched in 2021 called the "Lead-Free Water Challenge", EPIC along with key partners (Blue Conduit, Center for Geospatial Solutions, and WaterPIO) and a growing list of others, including the Newburgh Clean Water Project, 120Water, and GHD, offered free technical assistance to six initial municipalities to help jumpstart their lead service line replacement programs.

Maureen serves as project manager to assist communities with lead service line replacement by: 1) Connecting them to public funds for water infrastructure; 2) Assisting them with public outreach materials, media alerts and press releases, and community engagement strategies, including engaging with community-based organizations and other groups; 3) Connecting them with resources through EPIC's technology partners to develop lead inventories and dashboards; 4) Building their capacity as water sector leaders. Maureen leads the partnerships with engineering and technology partners, water utility managers and elected officials, and community-based organizations.

Funding Navigator

Midwest; Mid-Atlantic; South: Nationwide

Project Oversight & Management | 2022 – Ongoing

In her role as Director of the Water Program at EPIC, Maureen oversees work on the Funding Navigator project. The Funding Navigator has the goal of ensuring more communities, particularly those that are overburdened, benefit from government investments in safe and climate-resilient drinking water, lead service line replacement, wastewater treatment, and stormwater management. In particular, she contributes to fundraising and contracts, community engagement strategies, and lead service line replacement. EPIC has conducted outreach to more than 70 communities to date, with 40 communities in the pipeline for further work and/or a gap analysis to determine next steps.

Company

Water Finance Exchange

Years of Experience

28+

Education

JD, Duquesne University School of Law

MS, Environmental Management, Duke University

BS, Wildlife Management, University of Maine

Professional Affiliations

Chair and Co-Founder, Earth & Water Law

BRENT FEWELL

Regionalization Finance Strategist

Introduction

As an environmental lawyer and former corporate executive and senior U.S. EPA official in EPA's Offices of Water and Congressional and Intergovernmental Relations, Brent brings a wealth of knowledge and unique perspective to clients in navigating the regulatory and political arenas. He routinely works with water and wastewater utilities, advising on governance and compliance related matters. He also co-chairs the Water Ad Hoc Group, composed of all the national water and wastewater associations, aimed at advocating for additional funding and policy reform to increase the sustainability and resilience of water utilities across the nation. As a highly regarded thought leader on environmental policy and governance matters, his counsel and opinions are sought out by corporate and government leaders around the globe.

Relevant Experience

United Regional Water Cooperative

Sangamon and Logan Counties, IL

Technical Assistance and Government Relations | 2020 - 2020

United Regional Water Cooperative ("URWC") is the result of a regional collaboration of six rural water utilities in Central Illinois to construct a new water treatment plant. URWC constructed and maintains the treatment plant and transmission lines. The six entities purchase water wholesale, which allows them to retain local control of their systems. The $12.2 million project was awarded $5.2 million (45%) in grants from USDA-Rural Development, which included the remainder of the funding as a loan at a 1.5% fixed interest rate for 40 years. WFX also provided $120,000 in pre-development loan funding to complete a corrosion control study required by the Illinois Environmental Protection Agency. The pre-development loan has been repaid in full.

Hazlehurst

Hazlehurst, MS

Technical Assistance and Government Relations | 2021 - TBD

The Hazlehurst project included the rehabilitation and improvement of water and wastewater infrastructure under compliance order and with consideration for affordability of water rates. Brent led the communication and coordination between local and state officials on the status and resolution of the compliance enforcement order. He identified blended funding sources including Community Development Block Grants and State Revolving Funds.

Company

Water Finance Exchange

Years of Experience

25+

Education

BA, Economics,
Texas A&M University

Licenses & Certifications

FINRA Registered Representative licenses, Series 7, 63, 52, 53, 54, SIE and a CFA in ESG Investing

Professional Affiliations

Member, Water Environmental Federation

Member, Texas Association of Mexican American Chambers of Commerce Education Foundation

Member, Texas Water Infrastructure Coordinating Committee

ROGELIO RODRIGUEZ

Financial Structuring Co-Lead

Introduction

Rogelio initiates and executes projects for the Water Finance Exchange ("WFX") throughout the United States by engaging with communities and converging their infrastructure needs and project goals with affordability and financing. He facilitates a blended financing approach using federal, state, and philanthropic funding opportunities into a long-term strategy of sustainable financial and operational systems.

Rogelio brings a 25-year career in public finance having served hundreds of communities for billions in projects to address infrastructure needs and financial planning. He served as Managing Director for Oppenheimer & Co. and Senior Vice President and Head of the Texas Quantitative Group for FHN Financial Capital Markets, where he executed financings for cities, utility systems, large infrastructure, and governmental projects. Rogelio brings a history of credit analysis and financial modeling for utility systems, introducing opportunities for non-public funding and grants. He brings together stakeholder groups with leadership to present capital planning options with transparent rate or tax impact analysis to facilitate decision making for project execution and timelines. Rogelio has worked for complex municipalities to execute financing and funding alternatives that present the best options for flexibility and cost through a blended funding approach, combining federal, state, capital market and philanthropic funding together.

Relevant Experience

Santa Fernwood Water Supply District

Fernwood, ID

Technical Assistance and Funding Advocate | 2023 - TBD

The project includes the design and implementation of a water reuse facility to reduce the level of nutrients flowing in to the Coeur d'Alene lake. Rogelio provides technical assistance in project design and implementation, adds administrative capacity, translates discussions with regulators (IDEQ & EPA), and seeks funding alternatives.

9 Community Member Regional Collaboration

Presidio County, TX

Technical Assistance and Funding Advocate | 2023 - 2024

Presidio County, Texas is serving as the central hub for replacement and expansion of water and wastewater infrastructure across nine entities within the county. Project scope includes new, first-time water connections, improved wastewater infrastructure, and the repair and replacement of existing infrastructurees. A steering committee made up of 39 representatives from communities across the county was established to prioritize and seek funding for 42 projects that address drinking water, wastewater, and green infrastructure to improve resilience. Total Phase 1 and 2 costs are $13.659 million, of which $4.6 million has been received as 70% grant. Additional funding of $8 million is anticipated in a second round of 2024 DWSRF. The County is awaiting notification for $15 million of CWSRF and DWSRF in the 2025 round. In his role as Technical Assistance and Funding Advocate, Rogelio is providing technical assistance in project design and implementation, adding administrative capacity, translating discussions with regulators (TCEQ & EPA), and seeking funding alternatives.

Hazlehurst

Hazlehurst, MS

Technical Assistance and Funding Advocate | 2022 - 2024

The Hazlehurst project included the rehabilitation and improvement of water and wastewater infrastructure under compliance order and with consideration for affordability of water rates. In his role as Technical Assistance and Funding Advocate, Rogelio is providing technical assistance in project design and implementation, adding administrative capacity, translating discussions with regulators (TCEQ & EPA), and seeking funding alternatives.

Company

DAAR

Years of Experience

14+

Education

BS, Physics & Civil Engineering, Dual Degree Program, University of Wisconsin-Milwaukee/La Crosse, WI

Licenses & Certifications

Professional Engineer: WI, MN

WisDOT Certified Highway Technician:

Portland Cement Concrete Technician I (PCCTEC-I)

Materials Coordinators Training Department (MCT-D)

GREG BUBOLZ, PE

Engineering Lead

Introduction

Greg offers more than 14 years of experience as a Design Project Manager and Design Engineer. As a Design Project Manager, he has overseen multiple projects including pavement rehabilitation and pavement replacement projects. As a Design Engineer, he brings experience in plan production, environmental documents, Traffic Management Plans, Design Study Reports, public involvement, and utility coordination. Greg is specialized in bridge reconstruction and rehabilitation from slab span to multi span girder structures over sensitive waterways, railroads, and highways. Additionally, he is experienced with box culverts utilizing stream relocation and is an expert in analysis of the design and constructability of MSE walls. Greg brings a thorough understanding of construction administration including AWP and project finals process, and is skilled in design and review of construction staging with a vast knowledge of constructability. Greg is confident in C3D for typical sections, construction details, plan details and staging plans.

Relevant Experience

WisDOT, NC Region, 1170-19-03 USH 51, Oneida Street to Manitou Park Drive

Oneida County, WI

Project Manager

Greg was the Project Manager responsible for the design and plan preparation of a $9.5 million, 4.7-mile stretch of USH 51 between Hazelhurst and Minocqua in Oneida County. This reconstruction project includes a 10-inch pulverize and relay with a profile raise of 6-inches, four culvert replacements, curb and gutter replacements, and 500 feet of guardrail replacement. Responsibilities include public involvement documents, DNR documents, and plan development. Additional services include preliminary and final plan production, traffic staging details, estimate preparation, agency coordination, and preparation of final PS&E documents.

WisDOT, NC Region, 1140-00-07 USH 45 South, Givens Road to Church Road

Waupaca County, WI

Project Manager

Greg was the Project Manager responsible for the design and plan preparation of a $ 4.7 million, 8.4-mile stretch of USH 45

in Waupaca County. This pavement replacement rehabilitation project includes 2-miles of guardrail replacement, spot repairs to curb and gutter, and investigation of inlets and cross culverts. Responsibilities include public involvement documents, DNR documents, and plan development. Additional services include preliminary and final plan production, traffic staging details, estimate preparation, agency coordination, and preparation of final PS&E documents.dollar State- and Federally-funded paving reconstruction project. The project consisted of traffic control, excavation common, base aggregate, utility relocation, storm sewer, curb and gutter, concrete roadway pavement, sidewalks and driveway, and all incidentals necessary to complete the work.

WisDOT, NC Region, 1140-00-08 USH 45 North, Church Road to Reinke Road

Waupaca County, WI

Project Manager

As Project Manager, Greg was responsible for the design and plan preparation of a $ 4.9 million, 10.7-mile stretch of USH 45 in Waupaca County. This pavement replacement rehabilitation project includes 12 culvert replacements, spot repairs to curb and gutter. Responsibilities include public involvement documents, DNR documents, and plan development. Additional services include preliminary and final plan production, traffic staging details, estimate preparation, agency coordination, and preparation of final PS&E documents.

WisDOT NC Region, 1009-43-36 STH 17, STH 17 County Wide

Vilas County, WI

Project Manager

Greg was the Project Manager responsible for leading the design services to replace 15 culverts pipes along approximately 16.5 miles of STH 17 between Eagle River and the Michigan State Line. Responsibilities include public involvement documents, DNR documents, and plan development. Additional services include preliminary and final plan production, traffic staging details, estimate preparation, agency coordination, and preparation of final PS&E documents.

WisDOT NC Region, 1610-44-02 STH 13, CTH F to Walnut Street

Price County, WI

Project Manager

As Project Manager, Greg was responsible for the design services to address the deterioration and lengthen the life of the pavement structure for this rural, resurfacing project, which is located on STH 13, from the CTH F to Walnut Street in Price County. The design includes milling 1.5" of existing asphalt and overlaying with 3.75” of new HMA along with three (3) culvert replacements. Deliverables included an environmental document, Traffic Management Plan, and Design Study Report. Additional services include preliminary and final plan production, traffic staging details, estimate preparation, agency coordination, and preparation of final PS&E documents.

Company

DAAR

Years of Experience

36+

Education

MS, Civil Structural Engineering, University of Wisconsin-Milwaukee

BS, Civil Structural Engineering, University of Wisconsin-Milwaukee

Licenses & Certifications

Professional Engineer: WI

SAMIR AMIN, PE
Construction Lead

Introduction

Samir brings more than 36 years of municipal engineering experience, including serving as City Engineer for the City of Milwaukee. He offers expertise in planning, design, construction management and administration in all aspects of public works. Samir's strong public relations, management, and financial business planning skills support the successful execution and management of each project . Additionally, in his role as Project Manager for public works projects, he has developed extensive experience with budgeting, monitoring, staff oversight, agency coordination as well as client and public relations.

Relevant Experience

City of Milwaukee Lead Service Line Replacement Program

City Engineer

During his tenure as City Engineer, the City of Milwaukee created a stand-alone lead lateral replacement program that accounted for the removal of 5,808 lead lateral services since 2017. As City Engineer, he coordinated the City of Milwaukee's annual infrastructure plans (the largest infrastructure program in the State of Wisconsin) by working with sewer and water utilities to determine which road reconstruction projects would include new water services in which areas of the city.

Milwaukee Streetcar Project (Phase I)

Milwaukee, WI

Project Manager

Samir was the Project Manager for the $60 million construction of 2.5 miles of the streetcar through the downtown area of the City of Milwaukee. The project consisted of pavement removal, utility relocations, grading, track installation, pavement restoration, installation of poles for the electric overheard wires and all incidental required to finish the project.

East and West Capitol Drive (N. 7th Street to N. 91st Street)

Milwaukee, WI

Construction Supervisor

Samir serviced as the Construction Supervisor for this multi-million dollar State- and Federally-funded paving reconstruction project. The

project consisted of traffic control, excavation common, base aggregate, utility relocation, storm sewer, curb and gutter, concrete roadway pavement, sidewalks and driveway, and all incidentals necessary to complete the work.

West Fond du Lac Avenue (N. 19th Street to N. 51st Street)

Milwaukee, WI

Construction Supervisor

Samir was the Construction Supervisor for this multi-million dollar State- and Federally-funded paving reconstruction project. The project consisted of traffic control, excavation common, base aggregate, utility relocation, storm sewer, curb and gutter, concrete roadway pavement, sidewalks and driveway, and all incidentals necessary to complete the work.

West State Street (N. 35th Street to N. 64th Street)

Milwaukee, WI

Construction Supervisor

As Construction Supervisor for this mult-imillion dollar State- and Federally-funded paving reconstruction project, Samir oversaw the all project work. This scope included traffic control, excavation common, base aggregate, utility relocation, storm sewer, curb and gutter, concrete roadway pavement, sidewalks and driveway, and all incidentals necessary to complete the work.

Sewer Relay and Lining Projects

Milwaukee, WI

Construction Supervisor

Samir was the Construction Supervisor of hundreds of locations of sanitary and storm sewer relays that included excavation of roadways, installation of pipe ranging in diameter from eight inches to 72 inches, reconnecting existing laterals and restoration of the roadway. Management of multiple sewer lining projects ranging in diameter of six inches to 120-inch slip lining.

Featured Projects:

- North 30th Street (W. North Avenue to W. Lloyd Street) – 15" Sanitary Sewer Relay
- North Humboldt Blvd (E. North Avenue to E. Meinecke Avenue) – 60" Cured In-Place Lining
- North 30th Street (W. Meinecke Avenue to W. Center Street) – 120" Slip Lining

Company

H2N

Years of Experience

30+

Education

MD, Washington University School of Medicine

BS, Biology, Marquette University (via UWMC)

Licenses & Certifications

American Board of Family Practice:

- *Initial certification: 1997 – 2004*
- *Recertified: 2004 – 2014, 2014 - 2024*

Medical Licenses:

- *State of Wisconsin #38296*
- *Medical Council of New Zealand #49352*

CORINA NORRBOM, MD

Community Outreach Lead

Introduction

Dr. Norrbom is a Family Physician and has worked as a rural General Practice physician in New Zealand and in Wisconsin. Dr. Norrbom is very involved in improving population health on a local and state-wide basis. Since 2016, she has served as Assistant Professor, Co-Director Scholarly Pathways Physician in the Community Medical College of Wisconsin-Central Wisconsin. She is also a Health Policy Fellow at the Wisconsin Institute for Public Policy and Service.

Select Research and Publications

- **Marathon County Graduated its First 2 Classes of LENA Start Students: Free Early Language Program Expected to Double for Fall.** Norrbom, Corina. August 20, 2018. https://wisconsincentraltimenews.com/2018/08/20/marathon-county-graduated-its-first-2-classes-of-lena-start-students-free-early-language-program-expected-to-double-for-fall/
- **Marathon County Public Library to Become First "LENA Start" Site in Wisconsin.** Norrbom, Corina. October 23, 2017. https://wisconsincentraltimenews.com/2017/10/23/marathon-county-public-library-to-become-first-lena-start-site-in-wisconsin/
- **It's Everybody's Business.** Norrbom, Corina. April 25, 2017. https://wisconsincentraltimenews.com/2017/04/25/regional-substance-abuse-conference-at-wipps-its-everybodys-business/
- **Support Hmong Students on their Path to College: Dream Big 2056.** Norrbom, Corina. March 20, 2017. https://wisconsincentraltimenews.com/2017/03/20/support-hmong-students-on-their-path-to-college-at-the-dream-big-2056-fundraiser-april-8-2017/
- **Can WIPPS Survive Financially? Important Public Resource Challenged to Align Mission and Funding.** Norrbom, Corina. Wisconsin Central Time News, Volume 3, Issue 3, Summer 2016, p 4-5.
- **Baby Business: Investing in Early Childhood Education & Parent-Friendly Workplaces.** Norrbom, Corina. Wisconsin Central Time News, Volume 3, Issue 2, Spring 2016, p 9.
- Ivancich, Marko; Berry, Vince; Clark, Michael; Beaumont, Andrew; Norrbom, Corina; Amundson, Jeffrey. Self-reported concussion history among midwestern skiers and snowboarders. Concussion. Published online 1/19/23. https://doi.org/10.2217/cnc-2022-0007

- Stevenson, Michael; Norrbom, Corina; Savela, Mariana; Xiong, Yee Leng; Lee, Tou Fong; Garcia, Cecelia; Winstead, Otis; Northrup, Margarita; Sandy, Marie. Community Health Workers in a Time of Crisis: A COVID-19 Case Study. Journal of Humanistic Psychology, Special Issue: Equitable Pandemic Response & Recovery (2022).
- Chandratre, Sonal; Norrbom, Corina; Zeman, Christopher; Prunuske, Amy. Strategies to Integrate Community Engagement in Medical Student Education DOI: https://doi.org/10.24926/jrmc.v4i2.3600 Journal of Regional Medical Campuses, Vol. 4, Issue 2 (2021) z.umn.edu/JRMCAll
- Belton, Sharon; Bleske-Rechek, April; Giordano, Eric; Norrbom, Corina; Rasmussen, Olivia; Bunczak, Julie; Kjellesvig, Sofie; Prunuske, Amy. The Voices of Wisconsin Students: Learning, Coping, and Building Resilience During COVID-19. https://wipps.org/wp-content/uploads/2021/04/Voices-of-Wisconsin-Students-High-School-Report-FINAL-4.19.2021-1.pdf and https://wipps.org/wp-content/uploads/2021/04/Voices-of-Wisconsin-Students-Middle-School-Report-FINAL-4.19.2021.pdf Project and public reports commissioned by the Wisconsin Department of Health Services, 4/19/2021.
- Pollack, Elizabeth; Norrbom, Corina; Ehlinger, Edward; Remington, Patrick. Wisconsin versus Minnesota: A Border Battle for the Healthiest State. Wisconsin Medical Journal, Volume 115, Issue 4 (Sept 2016).

Company

LIUNA

Years of Experience

21+

Education

Madison East High School - Journey Worker Laborer, Madison, WI

Select Professional Affiliations

President and Business Manager, Wisconsin Laborers' District Council

Co-Chair, Construction Craft Laborers Apprenticeship Statewide Committee, Wisconsin Department of Workforce Development

Executive Board Member, Wisconsin State Building Trades Council

Executive Board Member, Wisconsin State AFL-CIO

KENT MILLER

Workforce Planning Strategist

Introduction

A third-generation member of LIUNA. Kent started his career in 2002 for a small union landscape company before starting work as a sewer and water pipelayer for both RG Huston Company and Speedway Sand and Gravel. Kent worked in the sewer and water industry for nearly a decade on projects throughout southern Wisconsin.

In 2012, Kent was hired as an organizer before becoming Assistant Business Manager of the Wisconsin Laborers' District Council in 2015. In 2018, Kent was also appointed to serve as the LIUNA International Representative for Wisconsin. On September 1, 2022 Kent became the President and Business Manager of the Wisconsin Laborers District Council. Kent is a member and co-chair of the DWD Construction Craft Laborer State Apprenticeship Advisory Committee, the Chairman of the Wisconsin Laborers' health and pension funds and sits on the executive boards of the Wisconsin State AFL-CIO and the Wisconsin State Building Trades Council. Kent is a proud member of LIUNA Local 464 and lives in Madison, WI with his family.

Company

Wisconsin Laborers' District Council

Years of Experience

15+

Education

MS, Educational Leadership, Northern Arizona University

BS, History, University of Wisconsin - Madison

SAUL CASTILLO

Workforce Development Lead

Introduction

Saul Castillo is the Director of Outreach and Equity for the Wisconsin Laborers' Apprenticeship and Training Fund in DeForest, Wisconsin. He works statewide to create structured programs and pathways to the Laborers Apprenticeship Program. He has a passion for reducing the barriers to entry into the trades for underrepresented populations.

Prior to this role, Saul held various positions at Madison Area Technical College including; working with Early College Programs to create pathways from high school to college, serving as an Operations Manager, and finally as Interim Associate Dean with the construction apprenticeship and Construction and Remodeling programs. In addition to his roles with Madison College, Saul brings construction industry experience from his time as an Industrial Pipefitter apprentice at General Motors, in Janesville.

Saul holds a Masters of Science in Educational Leadership from Northern Arizona University. As a first-generation Latino college student, he uses his other personal educational experiences, including having attended a two-year college (UW-Rock County), a traditional four-year university (UW-Madison), an online graduate School (Northern Arizona University), and three different technical colleges (Gateway, Blackhawk, MATC-Madison) to help guide others on their path through life.

Furthermore, he understands the work of the non-profit sector through work with community-based organizations throughout the years, including having served on the board for Worker Justice Wisconsin, and president of the board for the Workers' Rights Center in Madison. Twice, he has been a part of United Way of Dane County work groups (Latino Advisory Delegation and Delegation to Improve Behavioral Health). He currently serves as the co-chair for the workforce advisory committee of the Latino Academy of Workforce Development. He also serves as a member of the workforce advisory committee for the Boys and Girls Club of Dane County's McKenzie Regional Workforce Center. Furthermore, he partners with several other CBOs to identify pathways into careers with the Laborers to improve employment outcomes.

Company

Medical College of Wisconsin-Central Wisconsin

Years of Experience

21+

Education

Postdoctoral Fellowship, University of Wisconsin-Madison

PhD, Oncological Sciences, University of Utah

BS, Zoology, University of Wisconsin-Madison

Professional Affiliations

Physician, Community-CW Pathway Program
2019 - Present

Culturally Aware Mentorship Lead Facilitator, Center for the Improvement of Mentored Experiences
2020 - Present

NIH National Research Mentor Network Master Facilitator
2015 - Present

AMY PERNUSKE, MD

Public Health Strategist

Introduction

Amy brings more than 15 years of experience in public health and is currently an Associate Professor at the Medical College of Wisconsin-Central Wisconsin. Her research focus is on community engaged research and interventions designed to increase the participation of underrepresented students in science and medicine. Amy's initial training was in biomedical sciences, and she completed additional training in evidence-based education, qualitative methods, and system-based assessment. She has been involved in the development of several national level mentoring programs and provided numerous mentor trainings as a facilitator with the Center for the Improvement of Mentored Experiences in Research. Amy is adept at designing and evaluating interventions and mentoring student-based research projects.

Select Research and Publications

- **Using personas and the ADKAR framework to evaluate a network designed to facilitate sustained change toward active learning in the undergraduate classroom.** (Prunuske AJ, Evans-Anderson HJ, Furniss KL, Goller CC, Mirowsky JE, Moore ME, Raut SA, Swamy U, Wick S, Wolyniak MJ.) Discov Educ. 2022;1(1):22 PMID: 36590921 PMCID: PMC9793354 01/03/2023
- **Middle-School Student Engagement in a Tick Testing Community Science Project.** (Prunuske A, Fisher C, Molden J, Brar A, Ragland R, vanWestrienen J.) Insects. 2021 Dec 18;12(12) PMID: 34940224 PMCID: PMC8708189 12/24/2021
- **Medical Student Burnout as Impacted by Trait Emotional Intelligence - Moderated by Three-Year and Four-Year Medical Degree Programs and Gender.** (Treat R, Hueston WJ, Fritz J, Prunuske A, Hanke CJ.) WMJ. 2021 Oct;120(3):188-194 PMID: 34710299 10/29/2021
- **Strategies To Integrate Community Engagement In Medical Student Education.** (Sonal Chandratre rnCorina Norrbom rnChristopher Zeman rnAmy Prunuske .) Journal of Regional Medical Campuses. Chandratre, S, Norrbom, C, Zeman, C, andtPrunuske, A. J. Regional Campuses (2021) 4:2. doi. org/10.24926/jrmc.v4i2.3600 04/26/2021
- **Alignment of roles of near-peer mentors for medical students underrepresented in medicine with medical education competencies: a qualitative study.** (Prunuske A, Houss B, Wirta Kosobuski A.) BMC Med Educ. 2019 Nov 11;19(1):417 PMID: 31711472 PMCID: PMC6849195 11/13/2019

- **Scientific Presenting: Using Evidence-Based Classroom Practices to Deliver Effective Conference Presentations.** (Corwin LA, Prunuske A, Seidel SB.) CBE Life Sci Educ. 2018;17(1) PMID: 29378751 PMCID: PMC6007782 01/31/2018
- **Rural Family Medicine Outcomes at the University of Minnesota Medical School Duluth.** (Fuglestad A, Prunuske J, Regal R, Hunter C, Boulger J, Prunuske A.) Fam Med. 2017 May;49(5):388-393 PMID: 28535321 SCOPUS ID: 2-s2.0-85019453206 05/24/2017
- **The Development of an Indigenous Health Curriculum for Medical Students.** (Lewis M, Prunuske A.) Acad Med. 2017 May;92(5):641-648 PMID: 28441674 PMCID: PMC5402707 04/26/2017
- **Development of an interdisciplinary pre-matriculation program designed to promote medical students' self efficacy.** (Kosobuski AW, Whitney A, Skildum A, Prunuske A.) Med Educ Online. 2017;22(1):1272835 PMID: 28178916 PMCID: PMC5328374 02/10/2017
- **Efforts at Broadening Participation in the Sciences: An Examination of the Mentoring Experiences of Students from Underrepresented Groups.** (Prunuske A, Wilson J, Walls M, Marrin H, Clarke B.) CBE Life Sci Educ. 2016;15(3) PMID: 27521233 PMCID: PMC5008873 08/16/2016
- **Just-in-time remediation of medical students during the preclinical years.** (Prunuske A and Skildum A.) Med Sci Educ. Prunuske, A. & Skildum, A. Med.Sci.Educ. (2014) 24: 103. doi:10.1007/s40670-014-0010-9 09/07/2016
- **Application of the Introductory Molecular and Cellular Biology Assessment to Health Professional Students.** (Prunuske, A, Hunter, C, and Nemeth, K.) Medical Science Educator. Prunuske, A., Hunter, C. & Nemeth, K. Med.Sci.Educ. (2014) 24: 263. doi:10.1007/s40670-014-0046-x 09/07/2016

Company

M Serafino, LLC

Years of Experience

20+

Education

BA, Political Science and International Relations, University of Wisconsin

MIKE D'AMATO

Government Relations Strategist (State)

Introduction

Former City of Milwaukee Alderman Michael D'Amato does businesses in government affairs consulting through his firm M. Serafino, LLC. and specializes in matters of importance to municipal and local governments throughout the State of Wisconsin.

Mike served for three terms on the Milwaukee Common Council, leading the body as the chairman of committees related to zoning, economic development, public finance and intergovernmental relations. He is well-known for his expertise in local zoning and infrastructure matters and has excellent knowledge in the processes of local government and relationships with State of Wisconsin Departments and agencies. His strength is in dealing with the deliberations of elected and appointed bodies, as well as licensing, permitting regulations and community outreach.

As a long tenured former member of the League of Wisconsin Municipalities, Mike is has engaged with officials from throughout Wisconsin and has acute knowledge of the challenges and opportunities facing communities large and small. Previous projects with municipal clients include the Waukesha Water Utility and the Milwaukee Metropolitan Sewerage District. With the Waukesha Water Utility, the scope included working with governmental and quasi-governmental bodies such as the Great Lakes Governor's Association, the Wisconsin DNR and the City of Milwaukee Water Works. Mike presently serves as a Commissioner on the Milwaukee Metropolitan Sewerage. He was a founding member of the Local Government Institute of Wisconsin and formerly served as a member of the Milwaukee 7 Regional Economic Development Advisory Council, representing Kenosha County.

Mike has also made his mark in the nonprofit sector. He was Executive Director of one of Milwaukee's most successful housing and community development agencies and served as Wisconsin Director of the SEED Foundation in Washington D.C. after leaving office in 2008.

Mike is a graduate of the University of Wisconsin, with majors in Political Science and International Relations.

ADDITIONAL TEAM RELEVANT EXPERIENCE

MBE Hiring and Workforce Development Experience

The CIP team's approach to MBE hiring and workforce development aims to support three distinct yet interrelated pathways:

- **Workforce Development:** Prioritizing local hiring and supporting efforts to build a pathway to careers in the building trades.
- **Contractor and Entrepreneur Capacity Building**: Preparing local, small, minority-, and women-owned businesses for resilient futures.
- **Community Engagement:** Providing Program information and updates to the general public while performing educational and outreach services.

The result of this approach is broad community support for the Program, a local business community prepared to participate on the Program, and resident job seekers prepared to enter a new career.

The CIP team brings extensive experience implementing all aspects of this approach, both for CBP3s and for infrastructure projects delivered under traditional contracting methods. For example, CIP's Key Personnel led the planning and implementation of the Clean Water Partnership in Prince George's County, MD which achieved the following successes:

- Approximately $187 million, or 79% of every dollar spent, was awarded to target class businesses;
- A Mentor Protégé Program was established that identified and graduated 40 firms;
- An Emerging Landscapers Program was developed that provided green infrastructure training to landscapers seeking to develop technical skills.

Additionally, DAAR, Engineer and Prime General Contractor for the Program, is an MBE-certified firm and is committed to working with and supporting the growth and success of other MBE businesses.

One of the critical strategies to ensuring a growing and continued availability of laborers in Wisconsin is engaging community-based organizations, faith-based communities, educational institutions, governmental, and private sector partners. These collaborative relationships help drive awareness and understanding of career opportunities as a union laborer. Creating a sustainable pipeline of laborers is necessary to continue providing a well-trained workforce for current and emerging industry needs.

There couldn't be a better example of the need for this than LSL replacements. With the infusion of $15 billion of funding to replace LSLs across the country, one of the biggest concerns is contractor capacity, not just availability to perform the work, but the impact on price escalation resulting from labor scarcity. The CIP team will work closely with the Wisconsin Laborers' District Council to leverage its state-wide partnerships and programs such as WRTP|BIG STEP, which provides apprenticeship readiness testing and training to potential applicants. The Wisconsin Laborers' District Council also works with the Department of Corrections where it has partnered with the Department to provide career information for soon-to-be released persons in their care in collaboration with institutional Education Center and Job Center staff. The Wisconsin Laborers' District Council has also set up programs with Boys and Girls Clubs across the state in addition to working with Operation Fresh Start. With an impending labor shortage forecast as programs get underway across the state, the CIP team has the experience, partnerships and infrastructure in place to ensure the City does not feel those effects, including the Wisconsin Laborers' District Council's 55,000-SF training facility in DeForest, WI where we can customize curriculum to provide the type of training and certification required to scale alongside the Program.

Community and Stakeholder Outreach Experience

The CIP team has extensive experience conducting community and stakeholder outreach, including on all three operational CBP3s implemented by CIP Key Personnel. This CBP3 outreach experience included:

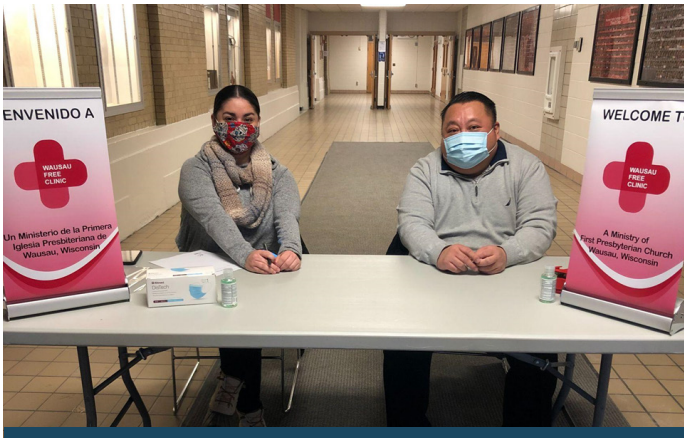
- **Clean Water Partnership:** 40+ meetings with residents to explain the scope of work, the impact and benefits to them and answer any questions. This outreach was done through a combination of community center meetings, churches and HOAs.
- **Fresh Coast Protection Partnership:** Working with private property owners across the greater Milwaukee region to access their land where it would be most impactful to incorporate into the program. This involved a significant degree of outreach and education to get participation as well as documentation, coordination and

collaboration to complete the projects.

- **Stormwater Authority of Chester CPB3:** Organizing and facilitating 30+ meetings across all 11 wards of an economically distressed urban center outside of Philadelphia, partnering with neighborhood leaders, local non-profits and community centers.
- **Clean Water Partnership:** Creating a Schools Program with 55 participating schools allowing students to participate in green infrastructure implementation.

Additionally, as a byproduct of having developed and deployed the industry leading technology platform for lead service line replacements, 120Water has developed a number of best practice business processes, particularly as it pertains to outreach, as a means of driving the highest conversion rates possible. Their experience working on the two signature LSL replacement programs in the country, Newark and Denver, highlight these capabilities. In Newark, they were responsible for a letter writing campaign and establishing a call center which both needed to account for the diverse and unique needs of the Newark community, specifically as it related to language. In both Newark and Denver, these requirements also extended to the deployment of testing kits, ensuring that all instructions for collecting samples and returning them to the lab accounted for language preferences.

H2N was created specifically to meet the unique needs of the Hmong and Hispanic communities during the COVID-19 pandemic. Because the organization resulted from a coalition comprised of a medical college, health systems and state health agencies, the core ambassadors to the community were the Community Health Workers ("CHWs"), a model that was familiar to those in the public health



Wausau Free Clinic During the COVID-19 Pandemic
H2N

RELEVANT PROJECT EXPERIENCE

H2N

Community Outreach: COVID-19 Pandemic Reponse

Marathon County, Wisconsin

H2N's Community Health Workers ("CHWs") were identified, trained and deployed into the Hmong and Hispanic communities in Wausau during the pandemic. They determined that one-on-one communications were going to be most effective in conveying key messaging and educating on vaccination and prevention. As a result, they talked with people at food distribution events, farms, churches, festivals, community centers, ethnic grocery stores, and food processing plants. CHWs met with small town community leaders and farm and business owners to gain access to people they were trying to reach. CHWs had over 8,000 conversations in their communities between May 2020 and January 2022. A multi-generational photo and video campaign featured area families. A one-minute video featuring diverse local young people reached 70,000 people after being broadcast by a local TV station. Between December 2020 and December 2021, H2N held pop-up vaccination clinics in over 30 locations, including farms, community centers, schools, churches, and festivals, giving over 1,000 COVID-19 and over 600 influenza vaccinations to underserved communities. The Southeast Asian population was the highest vaccinated ethnic group in the state, and Hispanic vaccine rates exceeded non-Hispanic rates in several counties (Wisconsin Department of Health Services, 2022).

space. Upon receiving the grant funding necessary to stand up the organization, H2N quickly realized there were a number of other unmet needs in those communities. In addition to performing outreach activities for COVID-19, they also expanded their scope of services to educate Hispanic and Hmong communities about health insurance enrollment and raising awareness of the 211 helpline, emphasizing a need to foster inclusivity for immigrant callers.

In late 2020, the H2N CHWs were trained for influenza vaccination outreach and subsequently organized five pop-up influenza clinics, recruiting and welcoming participants, answering questions and reassuring people in their own language in a culturally sensitive way. These experiences were critical in preparing CHWs for COVID-19 vaccination outreach once the vaccine became available in 2021. COVID-19 vaccination inequities abounded, underscoring the need for CHWs. H2N and a local Hmong community-based organization were persistent in advocating for vaccine slots designated for Hmong elders by the health department. Even after vaccine eligibility expanded to include people with chronic illnesses, health department vaccines were only allocated for seniors. With a generally younger population, this meant that few Hispanic people were vaccinated. It was also apparent that health systems were geared to serve their paying patient population, and many vulnerable people were not established patients. Initially, CHWs assisted elders and others eligible for the COVID-19 vaccine in finding and registering for vaccines. When vaccine eligibility opened, H2N organized pop-up clinics in the community with partners in safe, convenient locations at times amenable to work schedules. Between December 2020 and December 2021, H2N held pop-up vaccination clinics in over 30 locations, including farms, community centers, schools, churches, and festivals, giving over 1,000 COVID-19 and over 600 influenza vaccinations to underserved communities (Image 4). The Southeast Asian population was the highest vaccinated ethnic group in the state, and Hispanic vaccine rates exceeded non-Hispanic rates in several counties.

Financing Experience

CIP

Sean Agid of CIP has experience with financing each of the existing CBP3s that exist in the country to-date. This experience includes both public and private funding and financing sources for a variety of types of infrastructure including pipes and sewer projects, green stormwater infrastructure and other water infrastructure projects.

Public Funding Sources

Sean led the financial operations for the Clean Water Partnership ("CWP"), the first and largest CBP3 in the Country, and worked directly with Prince George's County, Maryland's leadership to secure grants and low-cost financing for the program that grew to nearly $350 million. During Sean's time working with the County, the CWP raised approximately $200 million from the Maryland Department of Environment's clean water state revolving fund. Nearly $10 million was structured as forgivable loans reducing the overall cost of the program for the County and its constituents. The money raised was used to finance hundreds of green stormwater infrastructure projects on public and private property which were subject to state and federal procurement requirements including competitive bidding, the Davis Bacon Act, the Buy American Act and other legislation.

Sean also led the financial structuring and operations of the CBP3 with the Stormwater Authority of the City of Chester, PA from 2016 to 2022. At the time, the City of Chester was in bankruptcy protection and was identified as one of the most economically distressed communities in the Country. As such, the city had no financial resources to contribute to the program. Sean worked closely with the City and it's the newly created Stormwater Authority to develop a stormwater utility fee that would provide the city a much-needed revenue source to pay for nearly $50 million in water infrastructure upgrades. To develop the utility fee, Sean worked closely with the EPA Region 3 and the State Revolving Fund, the Pennsylvania Infrastructure Investment Authority ("Pennvest"), and secured a $1 million planning grant to develop a rate study, impervious cover study, community outreach and engineering. Once the utility fee was developed, Sean continued to work with Pennvest and the Authority to develop annual project plans. These plans were submitted to Pennvest to secure low-cost long-term funding. This approach resulted in the city securing more than $43 million in funding, nearly $15 million of which were grants. The money was used to upgrade the city's sewer system, pipes and green infrastructure while spurring much needed economic growth. The money was subject to all state and federal procurement requirements and the program negotiated labor rates with the local union to ensure union businesses were represented within the program.

Private Funding Sources

During his work with the Milwaukee Metropolitan Sewerage District ("MMSD") and the Fresh Coast Protection Partnership CBP3, Sean helped to create a first-of-its-kind financing structure that utilized private financing to fully transfer all delivery risk away from the public sector. Sean worked with Goldman Sachs to structure a working capital financing facility. In this structure, the private financing was used to pay for all associated project costs, including sourcing, engineering, permitting and construction. Once a project was fully constructed and independently certified, MMSD would pay a fixed price agreed upon at contract execution. Therefore, if there were any cost overruns, the private sector would not be reimbursed for those costs. Furthermore, if money were spent on outreach, project sourcing or engineering for a project that ultimately was not built, MMSD would not pay anything for those costs. Because MMSD only paid for projects after construction was completed, the structure reduced unnecessary and wasteful expenses that are common in the infrastructure industry.

Implementation Lead for the Program, Pete Littleton, led the operations of the Clean Water Partnership CBP3 with Prince George's County as well as the CBP3 with the Stormwater Authority of the City of Chester, PA. Each of those programs had a capital stack that was comprised of a variety of funding and financing sources, with the largest being state revolving funds. However, under Pete's leadership, each program was able to source millions of dollars in grants with a goal of making the program as affordable as possible for each community.

Many public financing sources that are available to municipalities are somewhat restrictive and only available for technical expenses such as design and construction. However, there are additional components necessary to successfully complete an infrastructure program which may include community outreach and stakeholder engagement, workforce and contractor development, youth education, project sourcing and acquisition, operations and maintenance and other related expenses.

Pete was able to segregate project costs and match them with smaller grant programs ultimately securing approximately $20 million in grant funding for the two programs. For example, a grant from the Chesapeake Bay Trust paid for predevelopment costs for the Chester CBP3 that brought projects to a stage where they were eligible for financing from the state revolving fund. Another example is a grant from the Anacostia Watershed Society which funded the Clean Water Partnership's Teaching and Treating Program that built green stormwater infrastructure at Prince George's County's public schools while educating students on the importance of green infrastructure.

Water Finance Exchange

WFX is a proven national leader in the water infrastructure sector at a time when the federal government has made a major investment to address decades of deferred infrastructure funding with the support of technical assistance intermediaries like WFX. In less than two years, WFX has developed a leading partnership model and its technical assistance support and pre-development

United Regional Water Cooperative

Sangamon & Logan Counties, Illinois

United Regional Water Cooperative ("URWC") is the result of a regional collaboration of six rural water utilities in Central Illinois that collaborated to construct a new water treatment plant. URWC constructed and maintains the treatment plant and transmission lines. The six entities purchase water wholesale, which allows them to retain local control of their systems. The $12.2 million project was awarded $5.2 million (45%) in grants from USDA-Rural Development, which included the remainder of the funding as a loan at a 1.5% fixed interest rate for 40 years. WFX also provided $120,000 in pre-development loan funding to complete a corrosion control study required by the Illinois Environmental Protection Agency. The pre-development loan has been repaid in full.

loans have catalyzed more than $30 million in water infrastructure investments. Currently, WFX works in several states, including actively working with 27 communities and several regional collaborations involving a lead community and unincorporated or rural communities.

WFX has raised well over $3 million in funding from private philanthropy to realize projects and fund technical assistance operations for communities. WFX is an organization that sits at the inflection point of state, federal and philanthropic funding access to bring blended capital to water infrastructure needs.

Additionally, WFX Key Personnel, Rogelio Rodriguez, brings highly relevant experience having served as a public finance professional, including a portfolio within the last five years of 68 different municipalities for a capital raise of $4.7 billion. Additionally, he served as municipal advisor to the City of San Antonio for 12 transactions for $1.2 billion.

EPIC

In 2022, EPIC was selected by the US EPA as one of four national Environmental Finance Centers to connect disadvantaged communities to Bipartisan Infrastructure Law ("BIL") funds for water infrastructure. Through this work, EPIC is focused on disadvantaged communities between 10,000 and 100,000 in population and on helping communities replace lead service lines through their Funding Navigator Program which is supported by an EPA grant and by philanthropic donors.

The goal of the Funding Navigator Program is to ensure more communities benefit from government investments in safe and climate-resilient drinking water, lead service line replacement, wastewater treatment, and stormwater management. The program connects to overburdened communities and provides funding and technical assistance to local governments and water utilities to help them access public funds for water infrastructure. A diverse team of engineers and water professionals from the Funding Navigator team and led by a Funding Navigator Manager works with the water utility to conduct an analysis of local conditions, create a strategy to access financing and professional services and conduct community outreach, and help implement the strategy.

The Funding Navigator Program assists water utilities by hiring technical experts, facilitating community engagement, and coordinating with state agencies, regulators, and financing authorities. The program also assists in creating funding applications on behalf of eligible borrowers. The program will not replace an engineering, environmental, or contracting firm for a municipality or utility, but may manage, fund, and complement these professional services.

3

PROJECT APPROACH

PROJECT APPROACH

Through this RFQ, the City of Wausau and Wausau Water Works (collectively "the City") are paving the way as a leader in efficiently replacing lead service lines ("LSLs") on a city-wide scale while ensuring positive outcomes for the local economy and community. The approach to successfully executing this Program during the next five years will be new and innovative—not just to the City or even Wisconsin, but to the entire country. While this may be the first CBP3 for the City, CIP's Key Personnel have worked on all three of the CBP3s completed in the United States to date. As a result, the City can be confident in CIP's ability to successfully develop and execute a programmatic approach tailored to the unique needs and objectives of this first-of-its-kind LSL replacement CBP3.

The very nature of a CBP3 is predicated on incorporating socioeconomic benefits into the delivery of infrastructure. Because of this, the composition of the Program team is much more comprehensive and multi-dimensional than what is typically seen under traditional design-bid-build and design-build delivery models. As introduced in **Section 1**, CIP has assembled a team of national and local industry leaders offering a range of expertise and knowledge to deliver the Program through a solution which maximizes community benefits for the City while addressing its infrastructure objectives. Most importantly, this team has not only the individual expertise across each of the various disciplines required, it also understands how to work 'hand-in-hand' as an integrated team, inclusive of the City, to accelerate the replacement of LSLs throughout Wausau.

As detailed later in this section, the CIP team is confident in our ability to scale the City's current volume of 90 LSL replacements to a minimum of 500 LSL replacements in the first year, depending on funding availability. The work on the 500 lines during the first year will establish the foundation that is critical when scaling up in future years, primarily as it relates to outreach and workforce development. Concurrently to those 500 lines being replaced, the CIP team will coordinate with the City to plan the funding request for the second year, prioritizing areas that maximize principal forgiveness. Once the request is determined and in anticipation of it being granted, we will staff and scale the team to support the work to be accomplished with the new funding. This series of activities will repeat itself throughout the five years of the Program, scaling up and scaling down as the funding requests are submitted and granted. While all of this is happening cyclically, the funding and financing workstream will be continuously sourcing opportunities for additional funding grants and other innovative ways to bring capital to the Program in a manner that is amenable and approved by the Steering Committee (detailed at the end of this section). While intuitively one would think assembling as comprehensive and accomplished a team as this would be "expensive", a CBP3 delivery has proven time and again to deliver both faster and more cost effectively than traditional means, all while transferring the risk to the private partner—the Consultant/CBP3 developer.

Logistically, a Program office will be established in the City of Wausau. The Program office will be staffed with representatives from CIP and DAAR, with other team members and City employees receiving access as needed, potentially including Clark Dietz and Horsley Witten, two firms the City is currently working with in different capacities and which were identified in the RFQ solicitation. Eric Jones, Program Manager (CIP), will lead the Program Office and provide 'boots on the ground' leadership in Wausau. Eric most recently served in this role for the Clean Water Partnership in Prince George's County, Maryland, a $300-million clean water CBP3. The Program office functions as the CBP3 'headquarters' where all decisions and actions for the Program, both strategic and tactical take place. These include decisions and actions related to project management and planning, outreach, workforce development, funding and financing applications, and everything in between. One of the benefits of a dedicated Program office is that it serves as a central point for collaboration amongst all team members. Experience implementing prior CBP3s has proven that having a centralized physical Program office location spurs opportunities for the participating local small businesses to connect and work together outside of the Program, in addition to creating an environment that sparks collaboration and creativity when identifying opportunities for added efficiencies in Program delivery.

FINANCIAL APPROACH

One of the key benefits of the CBP3 delivery model is that it takes an unbiased approach to project funding and financing. Traditional public-private partnerships ("P3s") often use expensive private equity focused on maximizing the return for investors. In contrast, CBP3s seek the most cost-effective and 'best fit' capital for the Program's scope and objectives. The CIP team brings deep expertise in sourcing capital and structuring financing for a wide array of infrastructure programs. Our financial approach for the Program will prioritize grants and forgivable loans to maximize the number of LSLs replaced while reducing the financial burden to the City.

Bipartisan Infrastructure Law

The passing of the Bipartisan Infrastructure Law ("BIL") will provide $15 billion for LSL replacements across the country, with Wisconsin estimated to receive more than $370 million during the next five years. The Wisconsin Department of Natural Resources ("WDNR") will administer the funding program with 49%, or nearly $183 million, awarded as principal forgiveness grants and the remaining 51% as low-cost loans and set-asides for inventory and other related activities. Given the high percentage of principal forgiveness grants, CIP anticipates this funding will be a primary source of capital for the Program.

WDNR has released specific guidelines on how the program will be administered, including:

- The principal forgiveness portion will be awarded to disadvantaged communities or to projects in disadvantaged census tracts;
- All related project costs are eligible for funding on both public and private property; and
- Partial replacements are prohibited when using BIL funding.

There are key deadlines to use the BIL funding. Annual applications for each fiscal year are due on June 30th and an Intent to Apply is due October 31st each year. Upon award of the Program, one of the initial priorities for the CIP team will be to support the City in its submission of an Intent to Apply for SFY2025 which is due on October 31, 2023. In the event the Program contract between the City and the CIP team isn't executed by this date, CIP will work in good faith with the City to ensure all key deadlines are met.

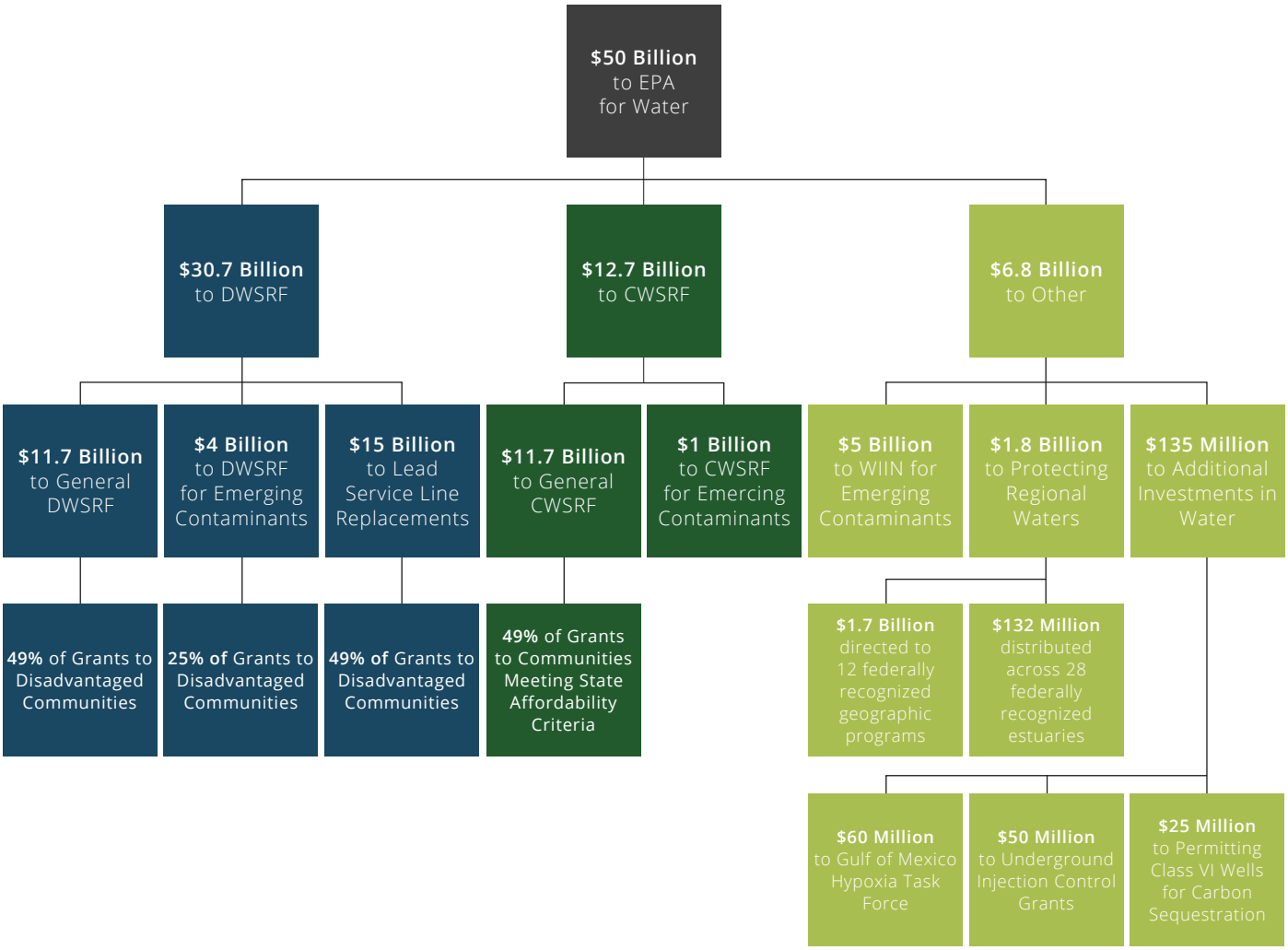
As illustrated in **Table 3.1**, WDNR has a specific scoring system to determine how much principal forgiveness each applicant will be eligible for. We will work closely with the City to develop funding applications to ensure principal forgiveness is maximized by bundling projects together either at a city-wide scale or census tract scale. As WDNR adjusts its guidelines, the CIP team will adapt and position Wausau to maximize grant and low-cost financing options. The point ranges below are based on criteria set by the EPA and the WDNR which include family poverty percentage, lowest quintile income, percentage of population under five years old, system optimization, and more.

Table 3.1: WDNR Scoring System

Score from Tables 1-6 of SDWLP IUP	% Eligble to Receive for Private LSL Replacements
200 to 360 points	Up to 100% PF
155 to 199 points	Up to 75% PF
95 to 154 points	Up to 50% PF
60 to 94 points	Up to 25% PF
0 to 59 points	Not eligible for PF

The $15 billion available for LSL replacements over the next five years is just one component of the BIL's $50 billion investment in water infrastructure. The BIL also expands the traditional Drinking Water State Revolving Fund program, providing more low-cost financing options available for communities such as Wausau. **Figure 3.2** on the following page details all the water investments from the BIL. The CIP team will seek all capital that is determined to be the best fit for the Program.

Figure 3.2: Bipartisan Infrastructure Law Water Investments



Water Infrastructure Financing Innovation Act

The Water Infrastructure Financing Innovation Act ("WIFIA") is an additional public financing option available to the City. WIFIA is more flexible than the BIL funding program in terms of project eligibility, so long as a project is related to water infrastructure. As such, LSL replacements are an eligible project cost. In order to use WIFIA, the total project cost needs to meet or exceed $20 million. WIFIA does not provide grants and will only finance 49% of the total project costs; however, WDNR funding can serve as the 51% match requirement. WIFIA will likely have a higher interest rate than the subsidized rates offered in the BIL, potentially making it a slightly more expensive option. However, a benefit to WIFIA is borrowers can defer payments for up to five years after construction is completed which can delay any necessary rate increases and debt service payments can be amortized over a 35-year period, reducing the annual debt obligation.

Regionalization & Rural Financing Opportunities

A key member of the CIP team is Water Finance Exchange ("WFX"), a 501c3 nonprofit and industry leader focused on regionalization for water infrastructure. WFX's regional approach to replacing LSLs can bring an economy of scale for smaller and rural utillties, given that the United States has more than 50,000 water utiltiies spread across the country.

The City has an opportunity to serve as a hub for a regional LSL replacement program in central Wisconsin. By developing and implementing a LSL replacement CBP3, the City will attract resources and expertise to central Wisconsin that can also benefit the surrounding smaller communities and utilities. This approach will not only position the City as a national leader for developing a regional LSL replacement program, but it can also attract additional funding, financing and technical assistance that wouldn't otherwise be available to the City and Program.

Relevant examples of this regionalization approach include the Rural Community Assistance Partnership ("RCAP") and the Great Lakes Community Action Partnership. Last year, RCAP was awarded $3.65 million to remove lead pipes in rural communities from the EPA to deliver on the President's Justice40 Initiative. Water Finance Exchange will not only identify the best organizations to partner with for the Program, but it will also develop legal and financial structures that bring more capital to the Program, making it more affordable for as many communities in central Wisconsin as possible.

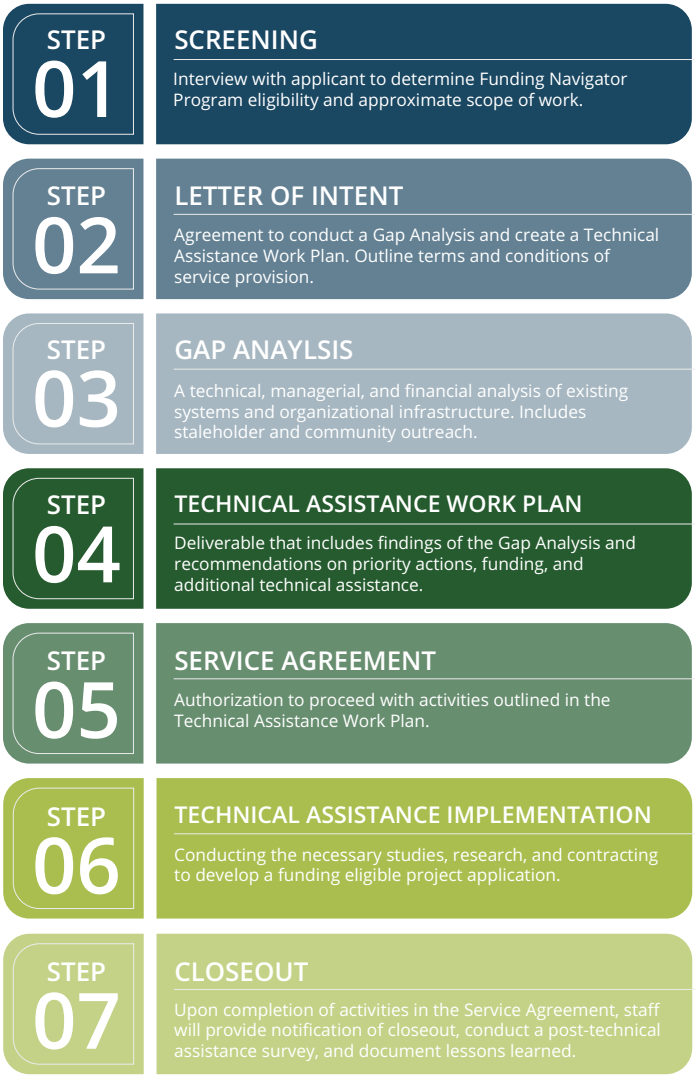
EPIC's Funding Navigator

Another financial resource available for this approach is EPIC's Funding Navigator which works with communities to identify, develop, and ultimately implement projects. The Funding Navigator program is designed to support agencies that have jurisdiction to administer public funds related to drinking water provision, wastewater conveyance and treatment, stormwater management, and general water resources stewardship. An eligible entity is defined by the EPA, and may include a local government, municipal authority, public utility, non-profit entity, or jurisdiction that is not currently part of a water or wastewater service area but is seeking to join one. A Funding Navigator Manager will work with an eligible entity based on community needs and priorities using the process shown in **Figure 3.3.**

Private Funding and Financing

The CBP3 delivery model has a proven ability to attract non-traditional funding sources such as grants from philanthropic and non-government organizations ("NGOs"). A successful method used by the CIP team on other CBP3s is bundling project funding packages in ways that align with the goals and priorities of different funding programs. While we envision the bulk of the funding coming from the LSL program within the BIL, we also anticipate seeking grants from a variety of sources. Some of the philanthropic and NGO programs may not be directly related to lead; rather, they could be related to public health, economic development, workforce training, community outreach, youth education and other critical components of the Program. As the scope of the program gets further defined with specific goals and objectives, the team will identify private grants and low-cost financing options available to the City to compliment the BIL funding with a focus on maximizing the amount of LSLs replaced at the most affordable cost.

Figure 3.3: Funding Navigator Process



Performance-Based Metrics and Consultant Fee Structure

The CIP team has experience working on all of the existing CBP3s in the United States—and we understand each CBP3 has unique goals and objectives specific to the communities in which they serve. In order to ensure those goals and objectives are achieved, it is important to establish performance-based metrics or Key Performance Indicators ("KPIs") which tie the performance of the CBP3 to the Consultant's compensation.

Upon award, the CIP team will work with the City to clearly define the technical, financial, and socioeconomic vision for the CBP3. Once the vision is outlined, we will work with the City's leadership to translate it into measurable and quantifiable goals and objectives. We will then propose a performance-based structure where CIP, as the

Consultant, will only be fully compensated if these programmatic goals, or KPIs, are achieved. The CIP team will recommend KPIs, and examples include a fixed price per LSL replaced, schedule guarantees, participation through a mentor protégé program, or percentage of programmatic expenditures to a specific demographic like small and minority-owned businesses.

Underlying all of the KPIs is the quality of the work being performed and the assurance that the replacement is completed to standard. To ensure this, a third-party inspector, hired by the City if they so choose, will be utilized to sign-off on the work which then serves as the trigger for compensating CIP as the Consultant.

Typically, this type of incentive fee is structured as a cost-plus fee, calculated as a percentage of actual program expenditures and paid periodically as the KPIs are achieved. The CIP team will also recommend a structure where 100% of cost savings are recycled back into the program to replace more LSLs. In other words, CIP's fee as the Consultant will be structured as a not-to-exceed percentage, even if the program overachieves and delivers replacements below the contracted price. For example, if the City and CIP agree to a $5 million annual plan and actual costs are $4.5 million, the $500,000 in savings will be rolled into the next year's annual plan to maximize the amount of LSLs replaced.

PROJECT SCHEDULING AND PHASING

One of the primary challenges with relying on the BIL for the majority of the Program's funding is the uncertainty around how much funding will be allocated to each applicant throughout the state and what percentage will be awarded as principal forgiveness versus low-interest rate loans. This uncertainty means municipal leaders are required to make decisions with incomplete information. Therefore, it is critical that the Program can scale up and down as funding is awarded to the City. The CIP team has experience executing this approach for other infrastructure programs and it requires working closely with the State Revolving Fund, ensuring there is sufficient contractor capacity, and thoughtfully communicating with homeowners and other community members involved with the CBP3.

As shown in **Table 3.4**, and depending on the availability of funding, the CIP team can ramp up the City's current replacement volume of 90 LSLs to 500 LSLs in the first year of the Program. After this first year, we expect to triple the volume to 1,500 LSLs replacements in the second year before reaching 2,000 LSL replacements in years three through five. This approach to scheduling will enable us to complete all 8,000 LSL replacements within the City's five-year timeframe. If sufficient funding became available, CIP believes it can complete all 8,000 LSL replacements in less than four years. As inventory is further refined and funding availability is solidified, the CIP team will adjust the schedule as needed.

Table 3.4: Five-Year Replacement Schedule

Replacement Year	Amount of LSLs to be Replaced
2024	500
2025	1,500
2026	2,000
2027	2,000
2028	2,000
TOTAL	**8,000**

At the onset of the Program, the team will develop a community outreach plan with the City (an approach further detailed later in this section) to inform homeowners about the CBP3 and get their buy-in. While outreach will be continuous throughout the five-year Project, we believe it will take three to four months to develop a scope detailed enough to create bid packages for contractors to submit proposals. Once the scope is finalized, bid packages will be developed on an ongoing basis, breaking the packages into manageable chunks to ensure smaller and local contractors can participate in the Program.

The CIP team expects each bid package to be available for approximately a month to allow enough time for contractors to submit a thorough proposal. Once bids are received, it will take about two weeks for the CIP team to review and an additional two weeks to negotiate a contract with the contractors. The next step would be to secure any required permits from the City, WDNR and other government agencies. The permit process is expected to happen in the winter months when weather conditions typically prohibit construction. This schedule will allow for Notice to Proceeds to be issued by March 1st each year and replacements to begin as soon as the weather allows. The team will follow this general timeline each year to maximize the number of LSL replacements that can be completed.

A crew of two individuals can replace two LSLs per day. Assuming there are 200 workdays during which LSL replacements can occur each year, factoring in winter, two crews of two people will be more than sufficient to replace the estimated 500 LSLs in the first year of the Program. As the Program is expected to triple its replacement volume in the second year, the CIP team will engage four crews, thereby ensuring enough capacity for approximately 1,500 LSL replacements. In years three through five, we will scale up to five crews in order to replace the required 2,000 LSLs each year.

At the onset of the Program and at the same time as community outreach is occurring, a workforce development strategy will be established to ensure contractors will be trained and certified in advance of starting work the second year when the required contractor capacity increases. The workforce development strategy will include detailed processes for contractor engagement, labor training programs, community job fairs, and high school and college career days.

Figure 3.5 on the following page provides an initial schedule for executing key workstreams including financial, community outreach, implementation, and workforce development activities during the Program's five-year timeline.

WORKFORCE DEVELOPMENT

In addition to funding availability, one of the biggest inhibitors to large-scale LSL replacement programs is contractor availability. The shortage of contractors capable of performing LSL replacements is expected to increase as a result of the City competing with other communities throughout Wisconsin as well as from the greater Chicago and Minneapolis regions.

The CIP team is confident it has the capacity to replace a minimum of 500 LSLs in 2024. In order to ensure there is enough local capacity to replace all 8,000 LSLs within five years, the CIP team will create tailored contractor and workforce development programs that will allow the program to scale to 2,000 LSL replacements per year. By working with nearby contractors and creating jobs for Wausau residents, our approach will allow the City to keep money invested in the Program local and accelerate the remediation of LSLs throughout Wausau.

To create a strong program with a culture of inclusivity, mentorship, transparency, and quality, the CIP team believes it is important to establish these values early on and keep them at the forefront throughout the process of contractor selection and execution of the work.

As the Consultant, CIP will work closely with DAAR (Engineer and General Contractor) and LIUNA to identify local contractors and subcontractors with relevant skillsets who value the benefits of a workforce development program.

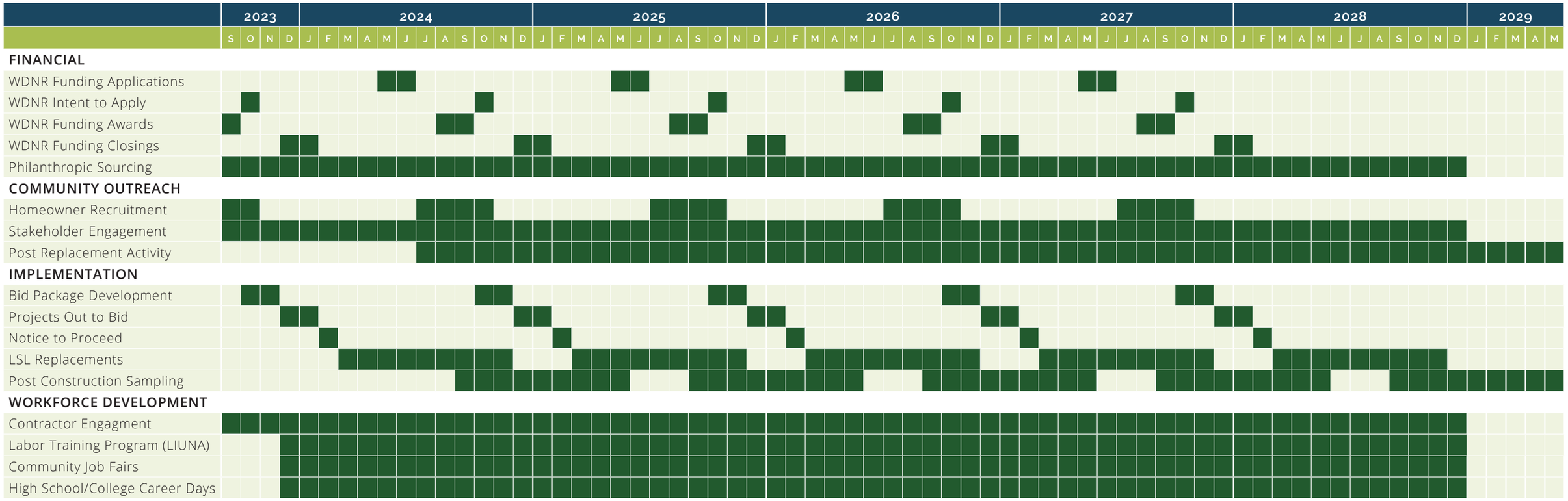
We will then assess these contractors to ensure they can meet all specific performance requirements of the Program, but also to learn more about each company's challenges and goals. As the CIP team "pre-qualifies" contractors for the Project, we are interested in more than just the size of a company or their bonding capacity. We will conduct a full business assessment with interviews to help each contractor identify both areas of strength and improvement, and then we create opportunities on the Program for each firm based on that assessment. On past projects, simple tweaks like splitting projects into smaller bid packages or having the prime general contractor provide bonding capacity for smaller firms has allowed more contractors to bid on—and work on—projects, increasing their experience in the field and building their bonding capacity for future work.

A thoughtful approach to contractor assessment and engagement is only one part of the CIP team's workforce development strategy; as the Program ramps up in the second year and after, contractors will need more laborers to successfully accomplish all of the required LSL replacements. By partnering with LIUNA, an international leader with more than 500,000 workers across the US and Canada and part of the White House's accelerator for lead service line replacements, we are able to leverage their robust training infrastructure allowing us to quickly build a pool of skilled laborers able to conduct LSL replacements and then connect those workers with the contractors who need them. Locally, the Wisconsin Laborers' District Council, an affiliate of LIUNA, has nearly 9,000 construction laborers across the state and a 55,000 square foot training facility in DeForest, WI.

The training could be provided to existing employees of selected contractors with guidance from our third-party inspectors, ensuring everyone's knowledge is current and that best practices are being used. We have found that by including third-party inspectors in project training and on contractor communication early in the process, we are able to promote consistency and a sense of partnership that translates to efficient problem-solving and quality workmanship in the field.

Continued on page 3-8

Figure 3.5: Schedule of Key Program Activities



As LSL replacement work continues in the City and throughout the region, more qualified firms and laborers will be needed to execute the scope. Utilizing LIUNA's network and connectivity will help the CIP team identify and train individuals—but there is more we can do. The CIP team intends to work with City workforce organizations to match workers with the Program. Also, by speaking to local colleges, trade schools, and high schools, we can educate young people on career paths and opportunities in this field, and connect them to contractors doing the work, so they will not just get training but a chance to build their careers. This not only helps the Program meet requirements for local workforce but could also bring an influx of money to the Wausau area by having Wausau contractors continuing to perform work as additional LSL replacement programs begin in the region.

COMMUNITY OUTREACH

Community outreach and stakeholder engagement are critical components to every infrastructure program. They are especially important to LSL replacements for a variety of reasons, inclusive of being able to meet the needs of a diverse community, along with the perceived intrusiveness to homeowners when executing the work and the necessary follow-up to ensure successful remediation of lead contaminants. To replace the 8,000 LSLs within the City, the CIP team will require access to the properties of thousands of Wausau residents, many of whom represent non-English speaking populations. As a result, a targeted, tailored, and coordinated outreach initiative must be developed in order to successfully gain access to these properties and accomplish the work while being mindful of the unique needs of the diverse constituents of Wausau.

The City has identified three key phases of communication to take place throughout the Program: Pre, During, and Post LSL Replacement. Each stage will require varying and tailored forms of communication with residents.

Pre-Replacement

As previously described in **Section 1: Project Team**, H2N has extensive experience conducting community outreach originating out of the COVID-19 pandemic, another public health-related event with many similar requirements for a successful LSL replacement program.

At the core of the H2N outreach model are the Community Health Workers ("CHW"). The CHWs represent a variety of geographic locations and social circles within local Hmong and Hispanic communities and are critical to building trust in the community. This trust has already been established through the work that was done during the pandemic. Given rural internet access issues, CHWs will utilize iPads and cellular data so they can access information through the 120Water platform and update data in real time. CHWs' transparency, establishing relationships, and maintaining trust, are critical during this process. As such, CHWs are a critical conduit back to the Program office and will share any community concerns, information gaps, and recommendations on modifying messaging that might be most helpful towards gaining consent to replace the line. In addition to educating the Program office and the larger project team, CHWs are imperative in working with and communicating to other potential stakeholders such as the state (WDNR) and other potential funders by sharing on-the-ground observations, concerns, and ideas that can be utilized not only in Wausau but the rest of the state.

Leveraging best practices from their work during the pandemic, Hispanic outreach focuses on dairy farm and food processing workers and their families, many of whom are undocumented, do not speak English, and cannot read or write in Spanish.

Language and literacy barriers that also exist in the Hmong community also present an obstacle to generic messaging and outreach. Many Hmong grandparents are unable to communicate with their grandchildren, and many speak but do not read Hmong. There is mistrust of those outside the Hmong community and there is a long, tragic history of being persecuted by their government. Because of this and the rise in violent crimes against Asian Americans, there is always a great deal of skepticism and mistrust that needs to be overcome in order to succeed with efforts such as this.

One-on-one conversations with trusted messengers are critical. CHWs engage within their extended families and social circles. They target conversations with people at food distribution events, farms, churches, festivals, community centers, ethnic grocery stores, and food processing plants. CHWs will meet with small town community leaders and farm and business owners to gain access to people they are trying to reach. CHWs will leverage channels already established during the pandemic to record public service announcements and podcasts on Hmong and Hispanic radio and develop messages for YouTube and social media that incorporate resource information and community stories in Spanish and Hmong. These communication strategies will address any common

questions and concerns that may exist, leveraging the experience of 120Water working on dozens of LSL replacement programs across the country.

The work of H2N during the COVID-19 pandemic established it as a highly credible and capable community resource. As the commitment to replace the entirety of the lead service line inventory in Wausau begins to take shape, many of the foundational policies, processes and structures put in place to respond to COVID-19 can serve as the jumping off point for how to tailor some of these components to what is required for an optimal replacement program in Wausau.

The pre-replacement phase of outreach will be focused on:

- Educating residents why lead is dangerous and the importance of LSL replacement;
- Communicating who is responsible for replacing the LSLs;
- Informing residents as to their options for participation within the Program; and
- Explaining the risks of opting out of the Program.

Prior to the start of the Program, the core outreach team consisting of CIP, H2N, EPIC and 120Water will craft a comprehensive communications strategy and campaign(s), determine the best methods, channels and cadence for communication, create or co-create all materials with the City, execute delivery of those communications, and help the City monitor and measure response. **Figure 3.6** highlights the outreach team's communication model.

Figure 3.6: Outreach Communication Model

In particular, the CIP team proposes establishing a Program website that provides general information, FAQs, a timeline, and a map, and also provides a phone number for a hotline that can be managed by an answering service. Any resident to call this line will receive a call back from someone qualified to answer their questions within 48 hours. This line will likely be especially helpful during LSL replacement. Additionally, understanding that not all residents have access to the internet, it would be prudent to make all outreach documents concerning LSL replacement available at libraries and community centers, and if possible, host all public meetings both online and in person. All of these tactics will be mindful of unique language requirements and other communication needs of the community.

We know it is critical to establish and maintain trust with residents over the course of an LSL replacement program, and the CIP team believes starting educational outreach as early as possible, making an effort to have personal contact with residents, and providing clear and consistent information will go a long way in building a rapport with the community—and importantly, ultimately result in a successful Program.

During Replacement

During LSL replacement, communication with residents will mainly consist of scheduling and updates to the timeline, and it will involve more direct communication with those community members immediately impacted by day-to-day activities. Although all information will continue to be updated on the central website established prior to the start of the Program, the outreach team will also provide proactive communication in the form of pre-construction meetings with all stakeholders, routine meetings with contractors, door hangers, phone calls, emails, and direct mail when appropriate during the LSL replacement period. Unexpected delays can happen during construction and to keep a customer's trust, it is imperative that any issue is immediately communicated in a professional manner, but also that a customer knows who they can contact should they have questions or concerns of their own. The outreach team will be the liaisons between contractors and residents to make sure all parties receive accurate information, are treated fairly, and have the best possible experience during their communication. In the cases where residents opt out of LSL replacement under the Program, the outreach team will take measures to ensure the property owner understands all options available to them, address any concerns, and if possible, attempt to reach a compromise. We understand that if the resident still

decides not to replace the LSLs on their property after this communication, the resident's sovereignty must be respected and the City is clear of liability.

Post-Replacement

Community outreach and communication following completion of the LSL replacement is a critical phase to ensuring the success of lead remediation and improving the Program. The outreach team believes that education on flushing, follow-up sampling, filters, and cleaning aerators should be provided during *all* phases of outreach but especially during this post-completion phase. This approach and timing of communication helps ensure residents are not surprised with any assigned responsibilities or confused by follow-up sampling. For example, flushing is imperative to a successful LSL replacement project and residents will be given easy access to instructions and reference material to ensure they fully understand the process and what is required of them. Residents should also be made aware of any follow-up inspections, who will conduct them, and what these inspections may entail. Similar to the process before and during a replacement, we would make this information available on the central website and on flyers in community centers, and/or through direct mailing/messages when relevant.

An essential part of the post-replacement outreach is the feedback survey. For the CIP team and the City to have a thorough understanding of the Program and to improve as it progresses through its five-year timeline, we need to know how residents are impacted, how we can lessen any negative impacts, and why some residents may have opted out of the Program entirely. Digesting these comments and providing the feedback to contractors or project management during routine meetings will give us the opportunity to improve our approach in real time, allowing the community to see the results of their voices being heard and earning the Program greater community support and buy-in.

Communication Tools and Data Management

The CIP team will use the communications module in 120Water's platform (detailed later in this section) to assist in sending both bulk and targeted, 1:1 communication to residents. These targeted campaigns are made possible by the customer and inventory data stored in the 120Water platform, but when one-size-fits-all public outreach is needed, our team also has experience working with bulk mailing houses for 'blanket-the-community' style campaigns.

RELEVANT PROJECT EXPERIENCE

120Water

City of Newark LSL Replacement Program

Newark, New Jersey

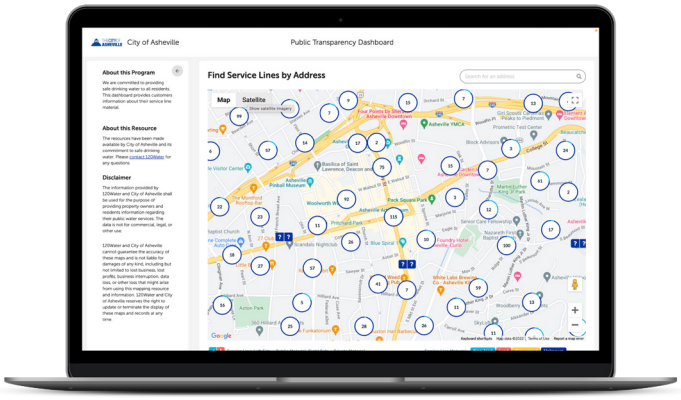
The City of Newark found it difficult to educate the community about the importance of the LSL replacement project and solicit their engagement in its ultimate success. To increase public awareness and involvement in the program, Newark partnered with 120Water in three key areas: post-replacement program management, sample kits, and resident communication.

120Water's services team, in conjunction with its partner network, was able to develop unique communications materials to inform residents of the project. By utilizing 120Water's EPA-approved, ready-to-ship kits and a lab partner network prepared to process thousands of samples, Newark saved themselves a significant logistical headache.

> *"The support 120Water has provided our team to ensure the success of our program is vital. From sampling logistics to creative ways to educate our community on lead, 120Water took work off our plate and allowed us to focus on other tasks that protect our community's public health."*

- Kareem Adeem
Director of Newark Water and Sewer

Figure 3.7: Example Service Line Public Transparency Dashboard



The 120Water platform, in addition to providing the data management capabilities necessary to execute the overall Program, will also provide the Public Transparency Dashboard (refer to **Figure 3.7** for an example dashboard). This dashboard is typically presented as its own microsite that can be linked to the City of Wausau website and keeps the City compliant with the requirements of the revisions as well as provides the public with a tool to identify the material of the service line at a specific address. As service lines are identified, verified, and eventually replaced, the updates in the 120Water Platform will update the Public Transparency Dashboard in real-time. No additional maintenance is required from the Wausau team.

PROGRAM TRACKING AND REPORTING

The 120Water Platform: Centralized Data Management

Data management is at the core of simplifying any LSL replacement program. Many communities have siloed, incomplete and inconsistent data which is a common inhibitor for executing effectively. The CIP team will use 120Water's data management platform to streamline all necessary data components including customer information, service line, water quality, and more to give the City and additional stakeholders a 360-degree, real-time picture of the Program's compliance needs. A mobile version of the platform is available for field service individuals to add real-time data that includes mapping, service line verification, service line replacement, and pictures of the service line for future reference. Information entered into the site triggers any required communication, testing, and pitcher and filters.

Summary Reports

The information in **Figure 3.7**, the example Service Line Public Transparency Dashboard, would constitute a 'Summary Report' delivered through the 120Water platform. As the platform is available 24/7/365 and updated as field verifications occur, Summary Reports are available to the City and Program stakeholders on-demand. All information displayed can also be easily downloaded as a CSV file. Reporting is not limited to inventory data but includes all sampling results.

Site Investigation/Inventory

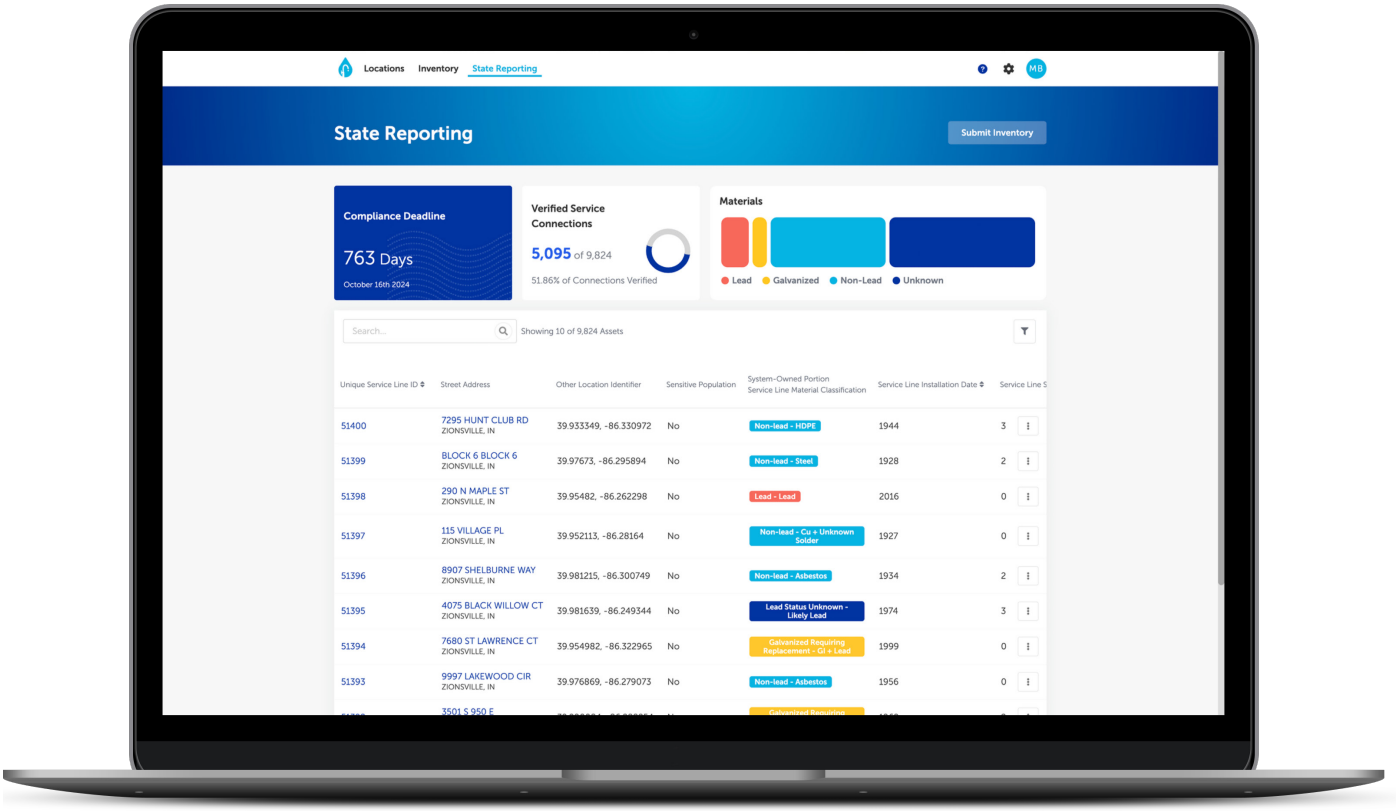
Inventory Validation is an iterative process that kicks off once the locations for validation have been determined. There are a couple different methods that the CIP team recommends for verification, the most common being hydrovacing/potholing and customer confirmation of material via lead check swabs. We will use the existing inventory to identify specific locations within the validation area for each method. We understand the City is currently working with engineering consultant Clark Dietz and would like to continue to do so. The CIP will coordinate with Clark Dietz to perform any site investigations, validations or any other responsibilities determined as the scope is defined.

Additionally, team member Blue Conduit, another firm in the White House Accelerator program, is a national leader in predictive analytics for LSL identification using proprietary machine learning methods to do so.

Sending postcards with lead check swabs is a fantastic way to efficiently get information about the customer-side of the service line. If the meter is above-ground, or the customer-side of the service line comes into the customer's basement, the customer can wipe the swab on the pipe and use the color of the swab to determine the material type. The postcard can be used for customer education and access to a QR code, which the customer can use to input the material type (and additional information) into a web form that will automatically update the inventory in the 120Water platform. 120Water's Customer Success team will be on board to assist with customer outreach and support these efforts.

Once materials are verified for the validation area and updated in the 120Water platform, the CIP team will re-run the model and update probabilities for all unknown service lines in the remainder of the Wausau service area. Our data team will analyze the results and determine the next area for a full verification effort, and repeat the processes

Figure 3.8: LSL Verification Program



detailed above. Once those verifications are received (and the 120Water platform is updated), we will again re-run the model and choose locations for a full verification effort. This process will continue until the CIP team has achieved 90%+ confidence in the model results, and the resulting data can be stored and updated on both the 120Water platform, and, if required, Wausau's GIS. **Figure 3.8** shows a screenshot of 120Water's LSL verification program.

PROGRAM GOVERNANCE

A key to executing a successful infrastructure program is a well-established governance structure. CBP3s are performance-based programs, an approach which increases the likelihood that goals and objectives are realized by tying the private sector's compensation to the results achieved. Furthermore, it's important that the public entity has full transparency into the program and is in a position to make and influence decisions.

For the Program, the CIP team recommends creating three committees that provide oversight and executive guidance for different components of the CBP3. The exact details and make-up of the committees will be solidified upon award; however, the committees could be:

- A **technical committee** that meets weekly or bi-weekly;
- A **financing committee** that meets periodically ahead of key funding milestones; and
- An **executive steering committee** that meets quarterly.

Each committee would be comprised of representatives from the City and representatives from the CIP team. City representatives could include members of the Mayor's administration, Department of Public Works, Wausau Water Works, City Council or other departments. Having this structure ensures that the City and its stakeholders continue to have visibility and influence throughout the entire Program.