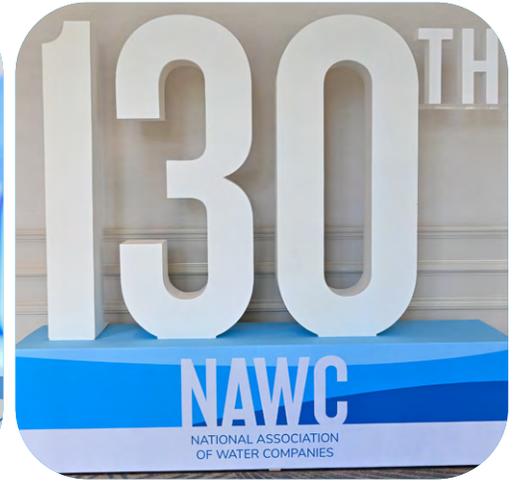


NAWC

2025

YEAR IN REVIEW





2025 was defined by unprecedented challenges for the U.S. water and wastewater industry. Systemic issues – from complex regulatory environments and increasingly stringent environmental mandates to the persistent reality of aging infrastructure – demanded immediate and decisive action.

The National Association of Water Companies (NAWC) and its member companies were at the forefront, not just observing these trends, but leading the charge to implement practical, sustainable solutions.

Advocacy and Strategic Priorities

Guided by the direction of our Board, committees, and member feedback, NAWC maintained a powerful and focused advocacy effort across federal and state levels. Our members expertly balance the core mission of safety and reliability with the imperative of affordability.

In 2025, we placed a laser focus on critical priorities, including:

- PFAS and Emerging Contaminants
- Water Affordability
- Cybersecurity and Resilience
- Strategic Infrastructure Investment
- Fostering a Constructive Regulatory Environment

Our Enduring Mission

For over 130 years, NAWC's foundational mission has remained constant: to support our member companies as they work tirelessly to protect public health, promote environmental stewardship, and deliver safe, reliable, and affordable water service.

NAWC is, and will remain, the leading resource and definitive voice on the issues shaping the private water sector. Recent history has only underscored the importance of maintaining this most vital resource.

Looking ahead to 2026, NAWC will strengthen its resolve to champion smart, long-term policy that supports sustainable investment, ensures regulatory clarity, and accelerates the adoption of innovative technologies. We are committed to empowering our members and ensuring a resilient, affordable, and safe water future for all communities we serve.

I am proud of NAWC's rich history and confident that our collective voice will endure because of the active engagement of our member companies and their dedicated employees.

Robert F. Powelson
NAWC Chairman & CEO



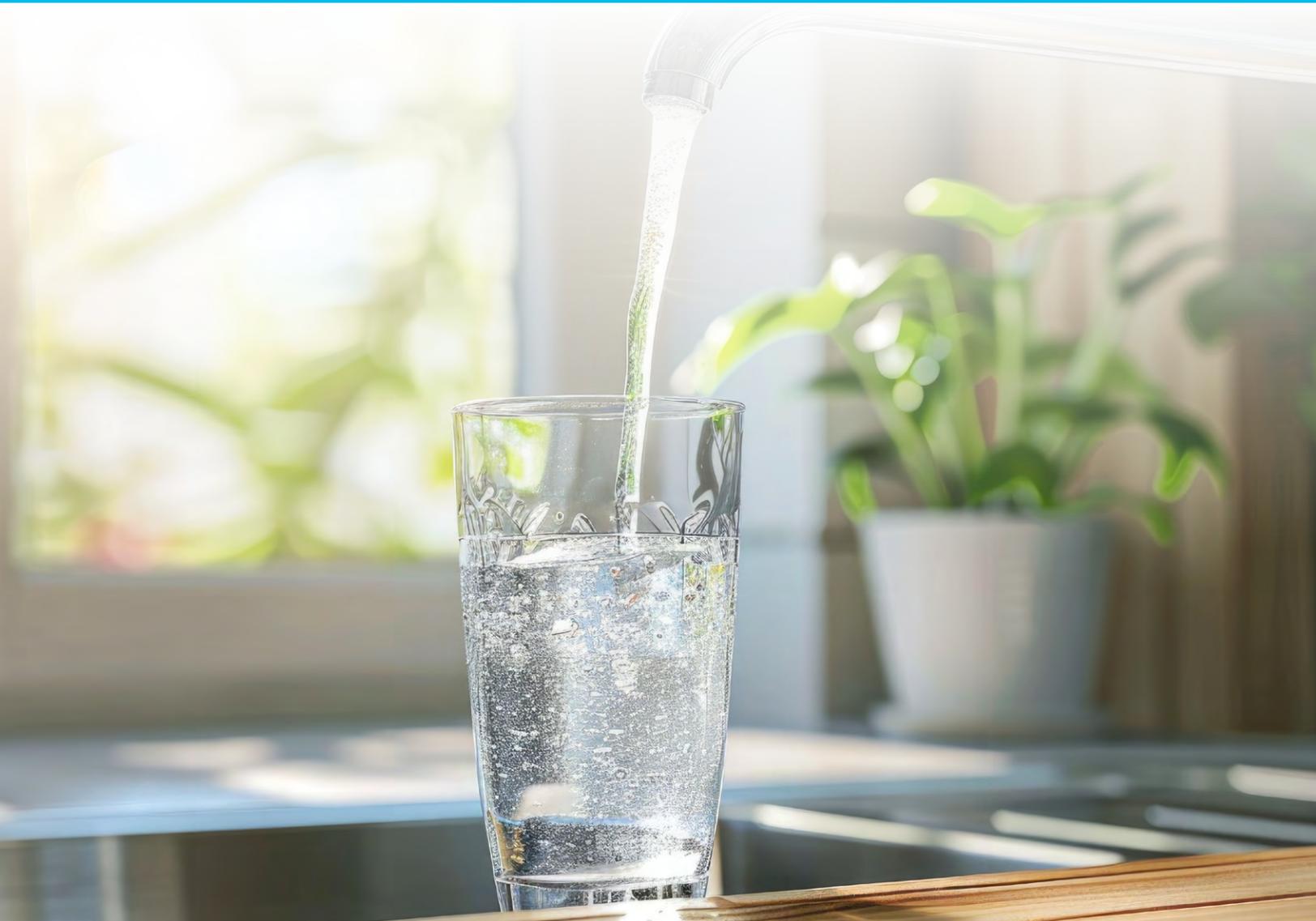
This report outlines the progress NAWC made in 2025 on four fronts, outlined as report sections in the table of contents below:

INDUSTRY + MEMBER ADVOCACY p. 4

EDUCATION + PROGRAMMING p. 10

COMMUNICATIONS + MARKETING p. 20

INDUSTRY RESEARCH + REPORTING..... p. 28



Industry + Member Advocacy

NAWC maintained a strong and ambitious advocacy presence throughout 2025, diligently working on behalf of our members across the legislative and regulatory landscape. Our efforts were strategically prioritized to support the Association's core mission to work to ensure safe, reliable water and wastewater service that is affordable.

Core Advocacy Priorities

Our targeted agenda encompassed a broad range of critical issues impacting the water sector:

- **System Resilience:** Focused on cybersecurity, infrastructure investment, and reliability.
- **Regulatory & Market Structure:** Supporting a constructive regulatory environment and addressing issues related to consolidation.
- **Small Company Support:** Ensuring the needs of small member companies are addressed.

Key Legislative Action & Regulatory Focus

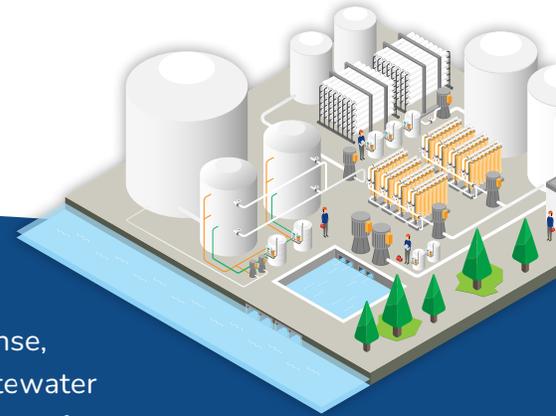
NAWC devoted significant resources to shaping policy on the most pressing issues of 2025:

Addressing PFAS Liability

NAWC advocated vigorously for a Comprehensive Environmental Response, Compensation, and Liability Act (CERCLA) exemption for water and wastewater utilities. Regulated, private water companies have already invested millions of dollars to proactively protect communities across the nation from the dangers posed by PFAS contamination.

Our strategic efforts focused on upholding the “polluter pays” principle and shielding water customers from the immense financial burden of remediating a problem that water companies did not create. Efforts included:

- **Direct Federal Advocacy:** Individually, and as part of a multi-association water sector coalition, NAWC met with the Environmental Protection Agency (EPA) and dozens of members of Congress and their staffs. NAWC specifically requested an exemption for water and wastewater utilities from liability following the designation of PFOA and PFOS as hazardous substances under CERCLA (the Superfund law).
- **Legislative Achievement:** NAWC sustained efforts on the Hill directly contributed to the introduction of a bipartisan bill in the House of Representatives, the Water Systems PFAS Liability Protection Act (H.R. 1267). This crucial legislation aims to legally protect water and wastewater systems from liability for the disposal of PFAS under CERCLA.
- **Strategic Coalition Building:** NAWC's advocacy on the CERCLA exemption for PFAS was significantly amplified through its leadership role within the Water Coalition Against PFAS. This powerful, multi-association alliance unites the nation's leading drinking water and wastewater sector organizations.



Water Affordability & Equity: Establishing a Permanent LIHWAP

NAWC aggressively supports reestablishing a federally funded Low-Income Household Water Assistance Program (LIHWAP) and making it permanent. This program is a vital lifeline that directly helps low-income households afford essential water services.

Our dedicated advocacy for the continued federal funding and the establishment of a permanent program included:

- **Direct Congressional Advocacy:** NAWC and its members met with numerous members of Congress and their staffs, making the case for the creation and robust funding of a permanent federal low-income assistance program.
- **Legislative Achievement:** These sustained efforts on the Hill led to a major milestone: the bipartisan introduction of the Low-Income Household Water Assistance Program Establishment Act ([H.R. 4733](#)) in the House of Representatives to permanently authorize LIHWAP.
- **Strategic Coalition Building:** We coordinated closely with allied associations and congressional offices to build comprehensive support for this initiative.
- **State-Level Outreach:** NAWC engaged in strategic outreach to state Public Utility Commissions, encouraging them to lend their influential voices by writing letters to their Congressional delegations in support of LIHWAP.



CWSRF Parity

A major legislative priority for NAWC in 2025 was the Clean Water State Revolving Fund (CWSRF). We championed the CWSRF Parity Act ([H.R. 3862](#)), crucial legislation that would expand the fund to include regulated, private wastewater utilities.

Our focused efforts to secure this expansion included:

- **Direct Legislative Outreach:** Conducting numerous, high-level meetings with members of Congress and their staff to build support and highlight the critical need for equitable access to federal funding.
- **Coalition Building:** NAWC coordinated and built a powerful coalition of national trade groups and labor unions, uniting voices to advocate strongly for the passage of the CWSRF Parity Act.
- **Legislative Achievement:** The bipartisan CWSRF Parity Act was introduced and referred to the House Transportation & Infrastructure Committee, Subcommittee on Water Resources & Environment.

NARUC Advocacy

The National Association of Regulatory Utility Commissioners (NARUC) represents the interests of the state public utility commissioners before the federal government and provides forums during which commissioners can further educate themselves on the industries they regulate. NAWC takes an active role with NARUC, ensuring the regulatory commissioners and their staffs have access to the latest information about the water and wastewater industry. NAWC engages regularly with NARUC's Committee on Water, providing expertise and assistance to align regulatory mechanisms with our shared goal of ensuring all customers have access to water that is safe, reliable, and affordable.

NAWC engaged with NARUC and the Committee on Water in the following ways in 2025:

- Participated in NARUC Water Committee business meetings and provided NAWC updates to the commissioners and staff.
- Met individually with commissioners and staff as requested when questions arose about issues within the industry.
- Developed and submitted panel ideas to the NARUC Water Committee for consideration covering all three annual NARUC meetings as well as the NARUC regional meetings.
- Ensured NAWC members were represented on numerous NARUC panels.
- Hosted networking opportunities for NAWC members with Commissioner and staff at each of the 2025 NARUC meetings.



NARUC
National Association of
Regulatory Utility Commissioners

Representing Industry Legal Interests

This year saw continued requests by member companies for NAWC's legal support before local and state jurisdictions. In 2025, NAWC supported in the following ways:

- Held quarterly NAWC General Counsels group meetings to facilitate communication and networking between members on legal issues facing the industry.
- Organized the second NAWC General Counsels in-person event in Philadelphia that included a full day of speakers on various legal topics.
- Participated in the California Water Service rate case before the California Public Utilities Commission (CPUC).
- Filed a request for rehearing in the Golden State rate case before the CPUC.
- Participated in the proceeding before the Connecticut Public Utility Regulatory Commission (PURA) to review the proposed acquisition of Aquarion Water by a newly formed public regional water authority.
- Filed an amicus letter in support of Liberty Utilities' Petition for Review filed with the California Supreme Court in the *Town of Apple Valley* condemnation matter.





**MORE THAN
90% OF NAWC
MEMBERS
HAVE A
CYBERSECURITY
PLAN IN PLACE**

Highlighting Cybersecurity

NAWC provided opportunities for members, legislators and regulators to further understand how the risks and threats to critical water infrastructure continue to grow and become more sophisticated. More than 90 percent of NAWC members have a cybersecurity plan in place; however, NAWC's members are the exception, not the rule, when it comes to preparedness and cybersecurity in the water sector. NAWC continues to work on cybersecurity issues in 2025 with the following initiatives:

- Advocated for cybersecurity needs to be top priority for the nation's water utilities – and for the federal government to provide necessary oversight.
- Promoted and showcased the innovative cybersecurity work being performed by NAWC member companies, positioning the regulated sector as a leader in national security and resilience.
- Held a webinar, featuring Rear Admiral (Ret.) Mark Montgomery, the Senior Director of the Center on Cyber and Technology Innovation at the Foundation for Defense of Democracies, that brought together industry leaders to address the evolving cybersecurity landscape and the critical importance of safeguarding the water and wastewater systems that are vital to communities across the country.
- Drafted a nondisclosure agreement for the NAWC Board of Directors that will allow Board members to share with one another confidential information related to cybersecurity incidents with the goal of communicating best practices in responding to and preventing these incidents.
- Achieved introduction of a bipartisan bill in the House of Representatives, H.R. 2594, to create an industry-led Water Risk and Resilience Organization to work with the EPA on the regulation of cybersecurity in the water sector to mirror best practices from the regulated energy sector.

Providing Small Companies with Advocacy Resources

America's drinking water and wastewater sector is highly fragmented with over 50,000 community drinking water systems, 84 percent of which each serve fewer than 3,300 people. NAWC is committed to providing its members who operate smaller water companies with resources to support their needs, including a forum to share best practices, expand communication strategies, develop collaborative solutions, and create a unified voice to advocate for their interests and priorities.



84%

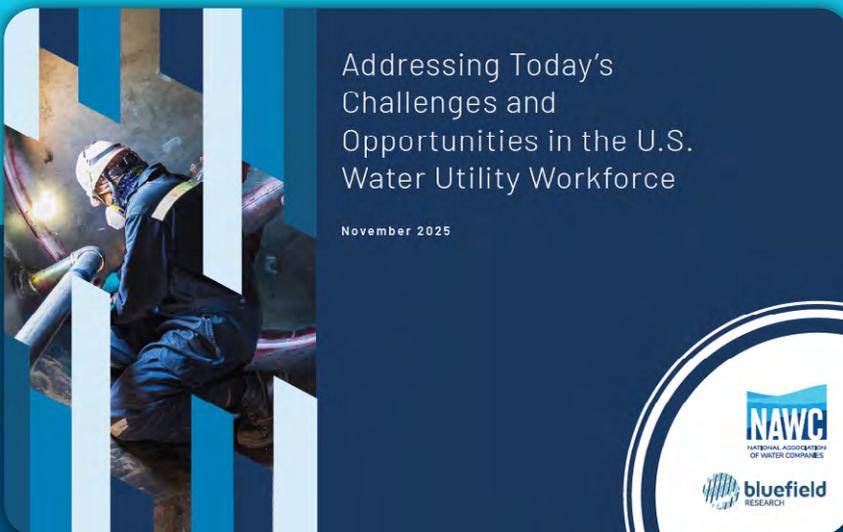
out of the 50,000 community drinking systems serve fewer than 3,300 people

Through all its activities, NAWC is proud to represent private water utilities of all sizes, working to bolster their operations and assist in maintaining private water's track record of excellence.

Workforce Development Advocacy

The long-term health of the water utility workforce is a perennial challenge, with several factors that may differ substantially depending on geography, population density, local industry, administrative structure, and other factors. While these issues will vary in prominence in individual contexts, there are common underlying causes to the challenges faced by the U.S. water utility sector workforce, taking into account broader issues of legacy infrastructure, deferred public investment, state policy considerations, and a larger overall conversation about community awareness and priorities regarding utility operations and their importance.

NAWC joined with Bluefield Research to spotlight this issue through a new research report. The report provides a holistic view of the key challenges that most affect the industry and organizations that are targeting different roadblocks to robust employment.



EDUCATION + PROGRAMMING

2025 saw strong participation and engagement with member company employees and public utility commissions from across the country. NAWC augmented a full slate of meetings with a variety of virtual events to provide more opportunities for education and interaction.

NAWC ensured programming was member-driven and provided valuable content and networking opportunities.



The Pennsylvania Chapter of NAWC held its annual education forum with member companies and regulators and staff from the state Public Utility Commission.



The NAWC Staff Policy Forum allows for in-depth conversations on key water issues. On left, EPCOR US General Counsel and VP of Public Policy Thomas Loquvam discusses resiliency. On right, Jonathan Reeder, Utilities Equity Research, Wells Fargo Corporate & Investment Banking, talks funding future utility investment with NAWC President & CEO Rob Powelson.

Commission Staff Water Policy Forum

NAWC held its 2025 Staff Water Policy Forum, a small roundtable event that educates commission staff about key issues in the water industry. The agenda for the event touched on many important topics such as cybersecurity, emerging contaminants, resiliency, ratemaking, and an overview of the industry.

CEO Retreat

Member company CEOs gathered to hear updates on the current U.S. and global economy and learn from top industry specialists on leadership development. NAWC was proud to welcome former Speaker of the House of Representatives Kevin McCarthy as the keynote speaker. The retreat was an opportunity for CEOs to build relationships and trust that translates into cooperation and respect among colleagues.

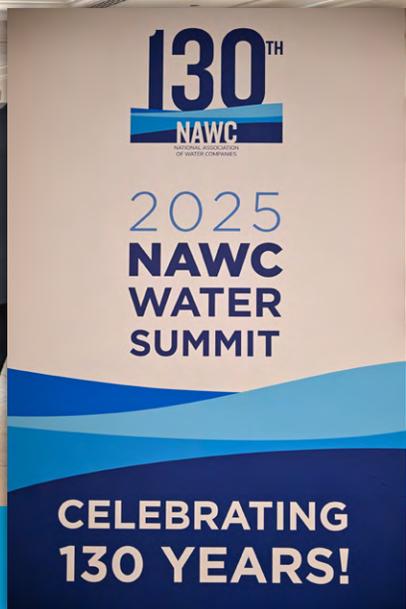
Government Affairs Forum

NAWC held the Government Affairs Forum, which focused on the priorities of the U.S. House during the 2025 calendar year. Attendees heard from Jake Tyner, former Chief Counsel, House Energy and Commerce Subcommittee on the Environment. Additionally, there was a discussion on what to expect from Trump Administration EPA.

Commissioner Water Policy Forum

NAWC hosted 18 commissioners for the Water Policy Forum. This intimate, invitation-only event provided members the opportunity to educate state utility commissioners about emerging issues in the water sector.





ANNUAL WATER SUMMIT

MORE THAN 350 PEOPLE attended the annual can't-miss meeting for the private, regulated water industry, held this year in Miami, FL. The annual Water Summit allowed attendees to meet with, hear from, and network with key water industry leadership from throughout the United States and to tackle the most pressing challenges and opportunities within the water sector.

Highlights include:

The summit commenced with a vibrant welcome reception, featuring special remarks from **Miami Mayor Francis Suarez**, setting an engaging tone for the days ahead.

On day two, **Keynote speaker Master Chief (SEAL) Retired & Medal of Honor Recipient Ed Byers** provided a powerful perspective on leadership and resilience. An annual Summit tradition – the **“Women in Water Breakfast”** – featured a fireside chat on mentorship and support for women in the industry.

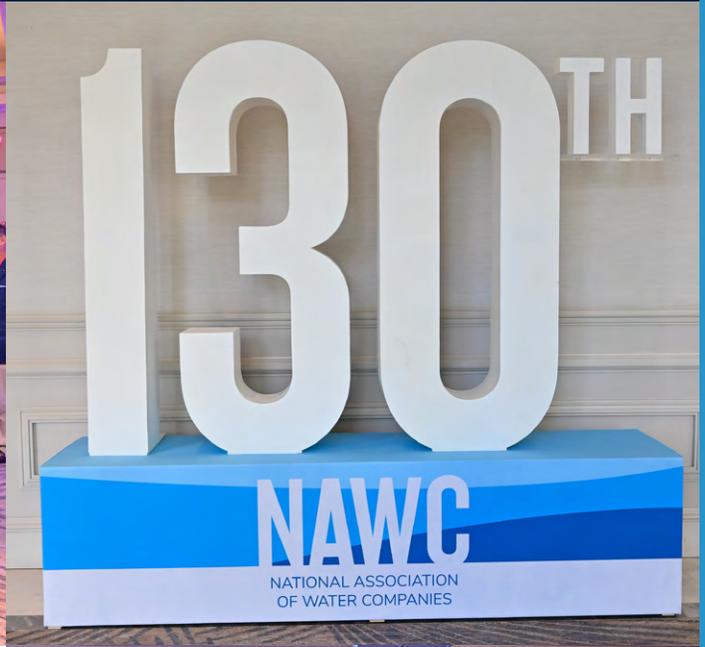


Tricia Pridemore, President, National Association of Utility Regulatory Commissioners; Commissioner, Georgia Public Service Commission, welcomes the crowd to the 2025 NAWC Water Summit.



Miami Mayor Francis Suarez kicks off the Annual Water Summit in Miami, FL, as NAWC President & CEO Rob Powelson looks on.

The Summit was jam-packed with insightful panels. A core theme, **“From Ideas to Action,”** explored how 130 years of innovation have been crucial in ensuring safe, reliable and affordable water and wastewater services, with discussions on pushing boundaries to deliver high-quality, cost-effective solutions. Another session, **“The Great Talent Search,”** addressed the critical issue of an aging workforce and the evolving skill sets required due to the



increasing integration of artificial intelligence and new technologies. The **“Cents & Sensibility”** panel provided valuable insights into effectively communicating the true cost and value of water to elected officials and customers, a vital aspect of public engagement.

A timely discussion, **“What’s Up with PFAS?,”** focused on the challenges, successes and best practices learned from water utilities in designing and implementing full-scale PFAS treatment facilities, alongside an examination of the legal implications of federal PFAS drinking water regulations. The **“Batten Down the Hatches”** session underscored the necessity for water and wastewater utilities to enhance their resilience against natural and man-made disasters, ensuring swift recovery and community safety.

The **“Peeling Back the Curtain”** roundtable offered an inside look at important topics from the perspectives of state utility regulators and NAWC member companies. A forward-looking fireside chat, **“What’s Old Is New Again,”** delved into the anticipated policies of the second Trump Administration and their potential impact on the water and wastewater industry. Finally, **“The Guardians of the Digital Realm”** highlighted the critical importance of cybersecurity in protecting interconnected water and wastewater systems.



On left: Pennsylvania Public Utility Commission Chair Steve DeFrank discusses utility rates and affordability with Essential Utilities Chair & CEO Chris Franklin. On right: Summit attendees connect in the vendor hall.



The NAWC Annual Water Summit agenda was filled with valuable content on emerging water issues. Top row, left: NAWC President & CEO Rob Powelson addresses the crowd. Top row, right: Central States Water Resources President Josiah Cox moderates the regulatory commissioner round table with, from left, Chair Thomas Gleeson, Public Utility Commission of Texas; Chair Kevin Thompson, Arizona Corporation Commission; Commissioner Mary Pat Regan, Kentucky Public Service Commission; and (not pictured) Commissioner Michael Bange, New Jersey Board of Public Utilities and NARUC Water Committee Chair. Middle row, left: Attendees enjoy the luncheon where (middle row, center) Chad Eggers of Carolina Water Service of North Carolina received the Living Water Award from NAWC President & CEO Rob Powelson. Middle row, right: Pennsylvania Public Utility Commissioner Kathryn Zeffuss joined Middlesex Water President & CEO Nadine Leslie for a fireside chat during the annual Women in Water breakfast. Bottom row: Attendees were able to enjoy networking time and vendor displays as part of the robust conversations at the Summit.





SAVE THE DATE



2026 NAWC Water Summit
September 14 & 15, 2026
Austin Marriott Downtown
Austin, Texas



Cybersecurity Webinar

Members, regulatory Commissioners, and their staffs attended an online event and heard from Rear Admiral (Ret.) Mark Montgomery on the latest issues of cybersecurity in the water industry and beyond. NAWC also hosted a Commissioner roundtable discussion on best practices.

Events in Conjunction with NARUC activities

NAWC hosted networking receptions at several of NARUC's meetings, as well as at the Mid-Atlantic Conference of Regulatory Utilities Commissioners (MACRUC) and New England Conference of Public Utilities Commissioners (NECPUC) regional meetings. NAWC receptions, which were very well attended, provided a venue for member company representatives, state public utility commissioners, and commission staff to connect.



Commissioner Michael Bange, New Jersey Board of Public Utilities and NARUC Water Committee Chair moderates a water workforce panel at the NARUC Annual Meeting. Joining Commissioner Bange are NAWC member company representatives, from left: David Johns, Regional President, Veolia Water Idaho; Colleen Arnold, President, Aqua; and Kris Hammer, Chief Human Resource Office, California Water Service Group.

Committee Meetings

NAWC's five committees met regularly throughout the year. These meetings provided opportunities for members to share information, work towards annual goals, and accomplish a wide variety of work highlighted in other sections of this document.



2026 Education + Programming

NAWC helps shape the water and wastewater industry by providing educational and impactful events that move the industry forward.

Check out the 2026 event schedule and mark your calendars!

 <p>JANUARY 25-27</p> <p>CEO Retreat</p> <p>EAU Palm Beach Palm Beach, FL</p>	 <p>FEBRUARY 9</p> <p>Reception at Winter NARUC</p> <p>The Conrad Hotel Washington, DC</p>	 <p>MARCH 23-24</p> <p>BOD Meeting & DC Fly-in</p> <p>The Hay-Adams Washington, DC</p>	 <p>APRIL 27-29</p> <p>Commissioner Water Policy Forum</p> <p>Hotel Bardo Savannah, GA</p>	 <p>MAY 18-19</p> <p>Community Engagement Seminar</p> <p>NAWC Office, Philadelphia, PA</p>
 <p>JUNE 2</p> <p>Summer BOD Meeting</p> <p>NAWC Office, Philadelphia, PA</p>	 <p>JULY 20</p> <p>Summer NARUC</p> <p>TBD Minneapolis, Minnesota</p>	 <p>SEPTEMBER 14-15</p> <p>Water Summit</p> <p>Austin Marriott Downtown Austin, TX</p>	 <p>NOVEMBER 9</p> <p>Reception at Annual NARUC</p> <p>TBD Puerto Rico</p>	 <p>TBD</p> <p>Holiday Reception</p> <p>Philadelphia, PA</p>

Celebrating 130 Years of NAWC



NAWC Board Chair Martin Kropelnicki, center, was joined by NAWC President & CEO Rob Powelson, left, and members of the NAWC Board to ring the opening bell for the New York Stock Exchange.

In 1895, the National Association of Water Companies was formed to advocate for private water companies as a collective. And for the past 130 years - as highlighted in our [commemorative video](#) - NAWC members have been pioneering programs that address critical water and wastewater challenges and implementing state-of-the-art technologies to enhance quality and sustainability. These efforts, coupled with consistent, forward-looking investments, have helped meet the growing demand for safe, reliable water while addressing the infrastructure needs of communities.

NAWC members are helping to solve the nation's water infrastructure challenges and proudly celebrated 130 years of delivering results for our members' customers. As part of the activities commemorating this historic milestone, NAWC [rang the opening bell](#) at the New York Stock Exchange (NYSE) in February. Ringing the NYSE opening bell provided a great opportunity for NAWC and leaders from member companies to highlight the strong financial health and essential role of regulated, private water companies in providing innovative solutions and infrastructure investments that work toward safe, reliable water, and wastewater access for all.



NAWC Living Water Award

NAWC members are dedicated professionals, innovative thinkers, inspiring leaders and engaged environmentalists. NAWC's Living Water Award is about recognizing the unsung heroes of our industry – those who go above and beyond their daily duties to make a lasting impact.

The award honors the contributions of these exceptional individuals who display commitment to company, colleagues, community, and the environment. [Each of the nominees](#) demonstrated remarkable courage and dedication in the face of immense challenges.

Their actions have not only protected our vital water systems but have also inspired us all to aim higher. Eleven exceptional 2025 Living Water Award finalists were recognized during the 2025 Annual Water Summit in Miami, FL.

Ultimately, the 2025 Living Water Award was awarded to Chad Eggers with Carolina Water Service of North Carolina. Despite losing his own dream home that he'd just built and possessions in a landslide caused by Hurricane Helene, Chad immediately reported to work when the storm was over. He played a vital role in assessing damage, restoring critical water and wastewater services in rural communities, navigating difficult terrain, and providing life-saving necessities. His hands-on involvement, including managing individual field activities and assisting with pipe and leak repairs, was unwavering. His knowledge of the local area and commitment served as an inspiration to his colleagues and the community, demonstrating profound resilience and selflessness. During this incredibly hard time, Chad served as a source of inspiration to those around him and personified the company's motto of "We've Got This!" He is praised for his "dedication, compassion and quiet strength."



Chad Eggers, left, a field technician III with Carolina Water Service of North Carolina, accepts the Living Water Award from NAWC President & CEO Rob Powelson.

THANK YOU

to NAWC's 2025 Sponsors and Associate Members for supporting the work we do.

PLATINUM SPONSOR



GOLD SPONSOR



GENERAL SPONSORS



SILVER SPONSORS



ASSOCIATE MEMBERS



COMMUNICATIONS + MARKETING

In 2025, NAWC prioritized the modernization and expansion of our communication and marketing strategies. Recognizing the crucial role of clear, science-based information, we undertook several key initiatives designed not only to enhance NAWC's visibility but also to equip our members with advanced outreach tools.

We effectively deployed integrated communication plans that layered earned media, digital outreach, and strategic national placements with targeted paid media campaigns. These efforts were designed to powerfully convey our core industry messages, specifically highlighting the regulated, private water sector's unwavering commitment to safety, reliability, support for permanent low-income water assistance funding, and groundbreaking innovation.

Digital-First Advocacy and Education Program



Conversations nationwide surrounding water and wastewater service continue to escalate. Regulators, elected officials, and customers are increasingly vocal about their concerns about water quality, reliability, and rates but those conversations often do not reflect the numerous benefits NAWC member companies provide.

NAWC's opinion research found that most regulated, private water customers incorrectly report that they have government-run water and attribute high-quality service to them. So, as part of our digital-first campaign, we will help educate persuadable consumers on who supplies their water and why that is important. The NAWC customer education tool will be promoted using a vanity URL (saferwater.org) and housed on nawc.org. It will allow consumers to enter their home address, identify

their drinking water provider, and be educated on the benefits of regulated, private water, particularly in terms of water quality and reliability.

The creative elements of this digital-focused campaign are designed to educate and solidify support among NAWC's identified persuadable target audience around the superior product that America's regulated, private water companies offer in terms of water quality and reliability versus their government-run counterparts.



The proof-of-concept campaign ran through June using focused, multi-channel content that included videos, graphics, data visualization and shareable content designed to target the key persuadable audiences. NAWC's omnichannel digital presence enables messaging to influence users across the online ecosystem, persuading them to consider benefits of regulated, private water companies.

The ads garnered more than 28.8 million impressions with more than 25,300 visits to saferwater.org. The ads inspired users to engage with the content to ultimately shift user perception, recording an 80% higher click-through rate and a 36% higher video completion rate than the industry average. Follow up research found that the ads insert a notion of value into the minds of consumers. When conversations arise about bills going up, consumers now have a better understanding of the value proposition of water.

28.8+
million impressions

80%
higher click-through



25,300+
saferwater.org visits

36%
higher video completion

The assets from this program are a resource for members. NAWC can work with its member companies to determine budget, ad placement, and more to help member companies prime their service territories and create awareness and acceptance of their vital role in their communities. The assets will prove valuable as member companies prepare for rate cases, acquisitions, or even an increasingly difficult regulatory environment.



Truth from the Tap



TRUTH FROM THE TAP

2025 has been a period of significant activity and achievement for NAWC’s Truth from the Tap (TFTT) campaign, as we celebrated 10 years of supporting member companies’ business development, public relations, and communications activities in the face of well-organized and well-funded opposition.

In 2025, our efforts focused on strengthening core messaging and providing valuable resources to help members advocate for and defend the private, regulated water sector. The team provided strategy counsel and produced fact sheets, infographics, blog posts, and op-eds, utilizing research and data to tell the industry’s story.

Highlights include:

- **Members-Only Webinar:** Truth from the Tap kicked off 2025 with a members-only webinar in January, providing an overview of the campaign’s origins, available resources, and future initiatives, fostering stronger member understanding and engagement.
- **Successful Member Advertising Campaign:** TFTT successfully executed a targeted Facebook advertising campaign for a member company, showcasing their local efforts. This campaign achieved the best metrics to date, demonstrating high levels of engagement and clicks to the company’s website, providing direct, impactful support to our members.
- **Content Development:** Numerous significant pieces of content were added to the TFTT toolkit and NAWC website to help address key issues including rate increases, infrastructure investment, water quality, and community engagement.
- **Two new case studies** illustrating the tangible benefits of utility valuation reforms for communities in Carteret County, NC, and Montebello, CA.
- **A comprehensive fact sheet** that leverages the EPA’s latest Affordability Needs Assessment to provide crucial context on the widespread need for rate increases to fund infrastructure upgrades and repairs, and advocating for a permanent federal low-income assistance program.

- > An infographic that leverages Bluefield data to highlight how NAWC member companies have some of the lowest rates of lost and non-revenue water among U.S. systems.
- > A detailed fact sheet comparing the EPA’s Drinking Water and Clean Water Needs Surveys to available federal funding. This resource illustrates the continued necessity of private investment in water infrastructure and explains why customers of both public and private systems are experiencing bill increases.

CARTERET COUNTY, NORTH CAROLINA: ACQUISITION ADDRESSES FINANCIAL CHALLENGES FOR SMALL, COUNTY-RUN SYSTEM

Carteret Water Service of North Carolina (CWSNC) acquired the 1,200 connection Carteret County water system in December 2023.

Under County management, the system had faced years of financial challenges, regularly operating at a loss and forcing the local Board of Supervisors to continually provide funding support to supplement rate revenues. In turn, the system had accumulated an operating debt of more than \$5.5 million over 20 years, leaving the state to consider fixing the system as financially distressed and prompting the County to heavily double rates in June 2024.

With the sale of the system, the County was able to eliminate a special district water tax, which unfairly applied to 2,600 local property owners who were not even hooked up to the system.

Commissioner Robin Connor called setting the water system a “no-brainer,” noting that “we [the County] aren’t really in the water business” and the system was not set up for success under County management. Connor and others who voted in favor of setting the system said they felt rates would be lower and service would be more efficient under CWSNC.

County Manager Tommy Burns agreed that private ownership would enable infrastructure investments and continued high-quality service. “Carteret County didn’t enter into the decision to sell the water system lightly, we researched our due diligence and found we were unable to sustainably deliver quality service to the community without continued significant rate impact. Drinking water is the local expert and will be able to support upgrades for quality service.”

Don Denton, President of Carolina Water Service of N.C., added, “We have a great partnership with the county and as our first TTY acquisition in N.C., we learned a lot about the process and look forward to additional opportunities.”

The Many Benefits of Utility Valuation Reform

16 STATES have passed utility valuation legislation:

California, Florida, Illinois, Indiana, Iowa, Kentucky, Maryland, Missouri, New Jersey, North Carolina, Ohio, Pennsylvania, Texas, West Virginia, and Virginia.

Utility valuation reforms are a critical step in addressing the infrastructure investment gap. A study of 10 states found that utility valuation reforms can lead to significant savings for customers and reduced environmental impact and more sustainable water management practices.

Utility valuation reforms can also lead to more efficient operations, and the potential to reduce the cost of water for customers and reduce the environmental impact of water treatment and distribution.

Utility valuation reforms can also lead to more efficient operations, and the potential to reduce the cost of water for customers and reduce the environmental impact of water treatment and distribution.

Bluefield Research Analysis Shows Private Water Companies Have Exceptional Record of Reducing Lost Water in the U.S.

America’s old and leaky infrastructure loses over two trillion gallons of treated drinking water every year. This is water lost through pipe breaks and leaks en route to your home or business. Water researchers estimate that this “lost water” costs utilities – and ultimately customers – \$2.4 billion annually.

An independent analysis released in April 2023 by Bluefield Research reveals that regulated, private water companies consistently achieve some of the lowest rates of loss and non-revenue water compared to other types of water systems, including municipal and other government-owned systems. This superior performance translates to significant cost savings for customers, reduced environmental impact and more sustainable water management practices.

Bluefield: Water Loss and Non-Revenue Rate Water (NRW) by Utility Type

Non-Revenue Water (NRW) includes water lost through leaks and other infrastructure failure as well as water that is not recovering economically through rates being charged.

Bluefield’s analysis found that, on average, most public- or government-run systems have a higher percentage of both water loss and non-revenue water compared to private systems. Further, “losing (RW)” a category that most (NRW) members fall into, have the lowest percentage of non-revenue water loss among all types of systems, providing evidence that these companies are effective at managing water resources.

Regulated, private water companies are leaders in addressing this critical issue through proactive infrastructure investment and efficient operations. The 15 largest water companies in the United States collectively invest over \$6 billion annually in community water systems. These investments are strategically targeted to mitigate leaks, enhance system reliability, safeguard against service disruptions and ensure the delivery of safe, high-quality water. And the proof is in the data.

> An internal compendium of public systems that have recently raised rates to fund infrastructure needs, alongside key quotes from third parties, to demonstrate that rate increases are driven by essential infrastructure investments, not private ownership.

> A “Water Quality Matters” infographic, highlighting findings from multiple studies that link poor water quality with negative health outcomes, underscoring the critical role of robust water systems.

> An internal collection of examples showcasing how NAWC member companies actively support local fire departments and fire prevention efforts, illustrating their broader community impact.

> A fact sheet highlighting how distrust in local water systems drives customers to use expensive bottled water, a phenomenon that can only be broken with infrastructure investment and professionalized operations.

> Two resources – a backgrounder and an infographic – that highlight the benefits of water system consolidation.

- Updated Industry Data Points: The team compiled data showing that the 15 largest private, regulated water companies invested more than \$6 billion in infrastructure in 2024. On workplace safety, an analysis of the latest Bureau of Labor Statistics data found that private water utility workers were 37% less likely to incur an injury or illness on the job compared to public utility workers. These data points are highlighted in various pieces of TFFT and NAWC content.
- Third-Party Research: A recent paper published by a University of Colorado economist provided powerful validation for our messaging, finding that privatization of drinking water systems “leads to an overall improvement in drinking water quality” and “economically meaningful benefits to public health.” The team also reviewed and provided summary analysis and rebuttal talking points for less favorable studies, including an analysis that found small, private systems have more monitoring violations than local government systems in Virginia and a study that found private systems have less progressive rate structures for low-income customers.



Enhancing Social Media Impact

In 2025, NAWC executed a targeted campaign to significantly enhance its social media presence by adopting a more dynamic and coordinated approach. This strategy was built on three core pillars:

1. Steady Cadence of Posts

We established a consistent and reliable publishing schedule across key platforms. This steady rhythm was critical for cutting through the noise, maintaining audience engagement, and leveraging the algorithms that reward regular activity.

2. Amplifying Member Messages

NAWC actively transitioned its channels into a powerful platform for member companies. This meant prioritizing the sharing of member successes, local initiatives, and thought leadership, effectively multiplying the reach of the collective regulated, private water sector's positive story.

3. Dynamic and Coordinated Approach

We moved beyond simple, passive posting. The approach became more strategic, coordinating posts with external events, policy developments, and national news cycles. This ensured our content was timely, relevant, and authoritative, positioning NAWC and its members as leaders in critical discussions, from infrastructure investment to water equity.

By adhering to this new, coordinated strategy, NAWC was able to boost brand visibility, drive greater engagement, and more effectively communicate the industry's commitment to safety, reliability, and innovation to target audiences.

Shared Editorial Calendars

We enhanced collaboration with member companies by implementing quarterly shared editorial calendars. This proactive approach enabled NAWC to gather and showcase content from members, strategically aligning messaging and optimizing post timing. As a result, we effectively amplified member stories while maximizing audience engagement and content reach.



Media Coverage

In 2025, NAWC used earned and paid media to educate and raise awareness around the critical issues facing our members and the tangible benefits of partnering with America's regulated water companies .

We deployed a holistic communications strategy to amplify the Association's leadership and expertise. This involved a strategic, integrated combination of:

- Earned Media: Securing impactful placements on key industry issues.
- Organic and Paid Digital Media: Using targeted campaigns to raise awareness in specific communities.

Our focused digital media campaigns highlighted the immense value provided by the private sector, specifically emphasizing water equity, substantial community infrastructure investments, and the exemplary safety records of our member companies. Furthermore, NAWC consistently maintained a high level of visibility by providing vital resources on a wide range of topics from infrastructure investment to cybersecurity and by proactively placing thought-leadership pieces from NAWC President and CEO Rob Powelson, thereby increasing NAWC's brand recognition among our target audiences.

[Energy and Utilities Stakeholders Urge Passage of Peters & Rounds Bipartisan Bill to Restore Critical Cybersecurity Protections](#)

Homeland Security: What are they saying (October 20, 2025)

[Field technician honored for efforts during Hurricane Helene](#)

Water Finance & Management (October 8, 2025)

[Ten takeaways from this year's NAWC Summit](#)

Global Water Intelligence (October 7, 2025)

[Sector applauds introduction of bipartisan water system resilience bill](#)

Water Finance & Management (October 6, 2025)

[PFAS Coalition: Congress must act following CERCLA decision](#)

Water Finance & Management (October 6, 2025)

[Opinion: Private water — a proven partner for CT's future](#)

Connecticut Mirror (August 13, 2025)

[National Association of Water Companies Rings NYSE Bell to Celebrate 130 Years of Advancing Safe, Reliable Water, Wastewater Access](#)

Businesswire (February 13, 2025)

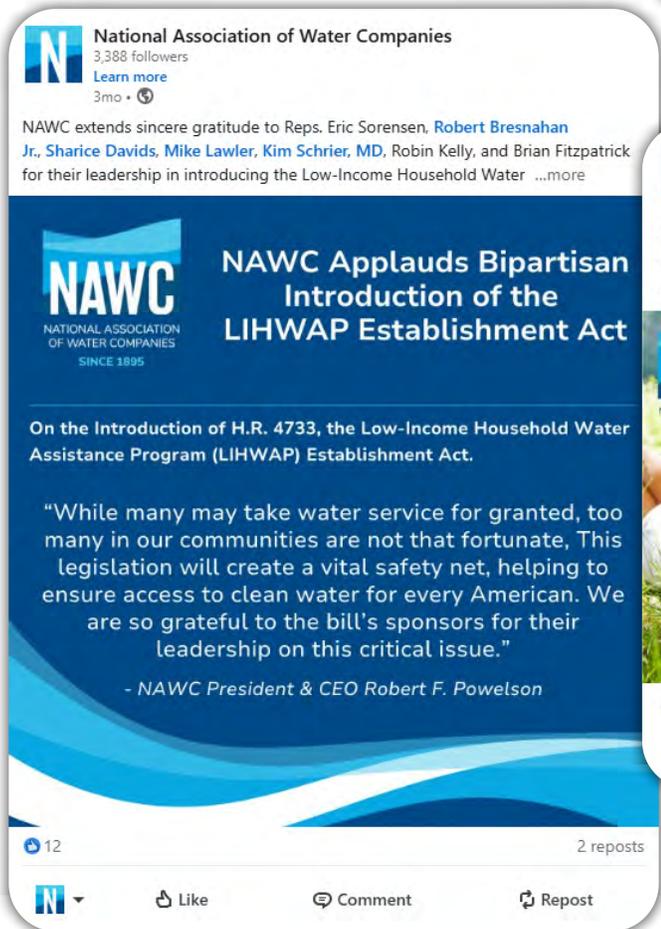
[Top D.C. lobbyist joins NAWC](#)

Water Finance & Management (January 23, 2025)



Digital Media

Paid digital marketing campaigns focused on the benefits of working with a regulated, private water company and promoting NAWC events by utilizing Facebook, LinkedIn, and X (formerly Twitter).



Direct Member Communications

Maintaining effective, consistent contact with our members is paramount to ensure they are fully aware of NAWC's advocacy efforts and the critical work being done on behalf of the industry. In 2025, we focused on improving our proven communication tools to enhance transparency and dialogue:

Letters from NAWC President and CEO: This monthly outreach proved to be a vital channel for direct communication on NAWC President and CEO Rob Powelson's priorities and areas of focus. These updates provided deeper insight, strengthening the dialogue between NAWC leadership and member companies.

Week in Water: A stalwart of NAWC communications, our weekly newsletter flourished this year with a steady drumbeat of essential industry content. We encourage all members to continue leveraging Week in Water as a primary tool for learning, sharing company news, and fostering communication across the regulated water sector.

THIS WEEK IN WATER

**Top stories of the water industry.
Here's what you need to know.**

NAWC + Trinnex Host AI-Focused Webinar

Webinar examined how data can guide more effective, proactive pipe replacement decisions with a case study from Golden State Water Company.

Ribbon Cutting at San Gabriel Valley Water Company Treatment Plant

Event celebrated completion of company's new treatment plant in Baldwin Park, Calif.

Aqua PA Celebrates 20 Years of Tree Plantings

Pennsylvania Horticultural Society and Aqua PA celebrated the 20th anniversary of the Trees for Watersheds grant program.

Lucasys Launches New AI Platform

NAWC Associate Member Lucasys launched Lucasys AI, an interactive, agentic AI platform for tax professionals.

NAWC

INDUSTRY RESEARCH + REPORTING

NARUC Sponsorships

In 2025, NAWC strategically utilized its unwavering sponsorship of every NARUC meeting to solidify a vital, close working relationship with state regulatory commissioners across the country. This consistent presence is crucial for ensuring the private water sector's voice is heard directly by the leaders who shape state policy.

Beyond financial support, NAWC actively participated in all NARUC regional meetings. We were a key contributor to the dialogue, either by having NAWC staff present on panels or by facilitating the participation of our member company experts. This deep engagement allowed us to provide timely, firsthand perspectives on industry challenges, reinforcing our commitment to constructive and collaborative regulation.

Industry Research + Reporting

NAWC actively leverages its expertise to serve as a critical resource for both the public and policymakers. Our aim is to move beyond general advocacy by providing insightful, verifiable industry data and high-quality educational content on complex water and wastewater issues.

We accomplish this by:

- **Serving as a Data Nexus:** Collecting, analyzing, and disseminating timely, science-based data on topics such as infrastructure investment needs, water quality compliance rates, and the economics of regulated, private utility operation. This positions NAWC as the definitive source for statistics and trends shaping the sector.
- **Educating Policymakers:** Producing concise, actionable briefs and expert testimony. This content directly informs regulatory debates and helps policymakers from state commissioners to federal legislators make decisions grounded in industry reality.
- **Empowering the Public:** Creating accessible, educational resources that clarify complex topics like PFAS treatment, cybersecurity safeguards, and the mechanics of water affordability programs. This outreach ensures the public understands the value, safety, and reliability delivered by regulated water companies.



By consistently providing this level of robust, unique, and timely data and content, NAWC ensures that discussions about the future of water and wastewater industry are informed, productive, and focused on sustainable outcomes.

Constructive Practices Database

NAWC continues to maintain and update its Constructive Practices Database, providing members with immediate access to a nationwide, searchable catalog of current legislation, regulatory decisions, and critical ratemaking practices impacting the water industry.

NAWC Member Survey

To ensure NAWC's programming, content, and advocacy efforts directly address member priorities, the Association issued a comprehensive member survey in September. This initiative sought direct feedback on NAWC's tangible value and performance throughout 2025.



NAWC Leadership



NAWC President and CEO Robert F. Powelson

Rob joined NAWC in 2018 after serving as a Federal Energy Regulatory Commissioner. He also was a Commissioner for the Pennsylvania Public Utility Commission for nine years, serving as Chairman from 2011-15. Rob is the past president of the National Association of Regulatory Utility Commissioners and chairman of the NARUC Committee on Water. He also represented the Water Committee on NARUC's Task Force on Climate Policy.

Board of Directors

Martin A. Kropelnicki* (Chair)

President & CEO
California Water Service Group

Patrick J. Kerr* (Vice Chair)

President & CEO
Baton Rouge Water Company

Josiah Cox*

President
Central States Water Resources

Ron Fleming

Chairman, President & CEO
Global Water Resources

Christopher Franklin*

Chairman & CEO
Essential Utilities

Joe Gysel

President
EPCOR USA

JT Hand

President & CEO
The York Water Company

Nadine Leslie

President & CEO
Middlesex Water Company

Rob MacLean*

President & CEO
Nexus Water Group

Robert Nicholson

President
San Gabriel Valley Water Company

Tom Puttman

President
NW Natural Water

Karine Rougé*

CEO
Veolia North America

Robert J. Sprowls

President & CEO
American States Water Company

Matthew W. Stanley

President & CEO
Beckley Water

Nicholle Taylor

CEO
Artesian Water Company

Lucy Teixeira

President
Aquarion Water Company

Andrew Walters*

CEO
H2O America

Rod West

CEO
Algonquin Power & Utilities Group

*member of Executive Committee



NATIONAL ASSOCIATION
OF WATER COMPANIES

National Association of Water Companies

Two Liberty Place

50 South 16th Street, Suite 2725

Philadelphia, PA 19102

267.691.7765

www.nawc.org



@NAWCH20



[/company/national-association-of-water-companies/](https://www.linkedin.com/company/national-association-of-water-companies/)



[/NAWCH20/](https://www.facebook.com/NAWCH20/)

