

THE INVESTMENT RECOVERY ASSOCIATION PRESENTS:



**MARCH 6-9, 2016**

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# THE CONFERENCE & TRADESHOW : MARCH 06-09

## If it's happening in IR...It's happening in Houston!

Be at the bullseye of everything Investment Recovery; hot topics, trends, networking and leadership development.



Get ready for the biggest round-up of unique education, networking and market-ready solutions in the industry. Now more than ever, the value of investment recovery (IR) is being recognized beyond the bottom line. From your company's sustainability commitment to your investors, IR is smart business. That makes IR professionals just like you, a big part of smart business decisions. And Houston is where you can get it; to learn—to lead—and link up with peers and industry experts alike. There's never been a rodeo quite like this!

### BENEFITS OF ATTENDING

- Investment Recovery specific education
- Professional speakers and subject matter experts
- Networking
- Meet multiple Investment Recovery vendors in one location
- Only IR professionals understand your business and your challenges
- All this for a reasonable price

### ONE-OF-A-KIND EDUCATION

No other conference or academic setting offers an educational program designed by IR for IR professionals. Take home actionable information on how to optimize the 7Rs of Investment Recovery. Gain insight into metal markets, economic trends and appraisal best practices. Get empowered with new leadership skills with a fresh perspective on business ethics. Share your experiences in interactive forums where challenges shake hands with solutions. All this...and so much more in just three days.

### NON-STOP NETWORKING

Over coffee, in sessions, during breaks and on the trade show floor, you will be meeting colleagues and IR rock stars — everywhere. But, networking during business hours is well...business. We like to have fun, too! Mix and mingle at the **Monday night reception**...whoop it up with your partners at the **Tuesday night rodeo**...go home with powerful new connections and friendships.

### MARKET-READY SOLUTIONS

Looking to upgrade? Want help with implementation? Have a can't-wait challenge? Then look no further than the action-packed **Trade Show**. With more than 40 vendors, hundreds of attendees, and unlimited product and service solutions, it's going to be buzzing with excitement. Get expert advice, kick some tires and find practical solutions under one roof, on Monday and Tuesday.

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# EDUCATIONAL SESSION HIGHLIGHTS : MONDAY | MARCH 07



## Welcome to Houston! By CenterPoint Energy

**David Hess**, Senior Manager of Electric Operations, Purchasing, and Logistics

**Rick Bye**, Director Environmental Services

CenterPoint Energy, headquartered in Houston, Texas will provide us with a big Texas Welcome to kick-off the conference on Monday morning. David and Rick will be sharing the value CenterPoint Energy receives from the relationship with their Investment Recovery department and other key pieces of information about their electrical operations.

## Leader-to-Leader

**Jerry Forte**, CEO, Colorado Springs Utilities

Jerry is passionate about the Leader-to-Leader concept he developed and implemented at CSU. This intensive, multi-year program helped create a legacy of leadership that sustains the continued success and growth of the municipality. Gain an understanding of the characteristics and day-to-day attributes of a great leader and valuable insight into the necessary tools that elevate your own skills.

## IR Sustainability Best Practices

**Russ Wilkenloh**, CMIR, Asset Manager, Duke Energy

Great info on the best practices an investment recovery department should consider implementing in their company's sustainability activities! A group from the Electric Utility Industry Sustainable Supply Chain Alliance, led by Russ, collected information from the IRA members during the 2015 networking sessions at the Chicago IR conference. Information from these sessions were used to compile this report, which will be discussed at length.

Best Investment Recovery practices include:

- Incorporating desirable sustainability practices in the IR Bid Process
- Measuring waste reduction and recycling improvement
- Aligning IR with other Supply Chain functions to improve performance and reduce waste
- Aligning the IR function with organizations outside of the Supply Chain and/or Company
- Considering alternative disposal practices

## What Keeps You Up At Night?

*Facilitated by the Conference Committee*

We wanted to give you a platform to tell us what is relevant to you today. Join this active session as we all discuss the pressing issues or concerns we face, but don't feel we have the right answers for. You may want to share something new you are finding success with. From the seasoned IR veteran to someone new to this dynamic work, there are no boundaries as to what may be discussed...except for time!

## An Update on the U.S. Economy

**Tatiana Bailey**, Ph.D., University of Colorado

The economy effects the numbers you are required to hit at work down to your own personal budget. Dr. Bailey, Director of the Southern Colorado Economic Forum and faculty member of the University of Colorado, will share with us her insights and knowledge:

- An overview of economic trends and major national economic indicators since 2000
- Where the trends are "trending" since the end of the recession, and what the U.S. fundamental strengths and weaknesses are currently
- How those strengths and weaknesses will likely effect the remainder of 2016 and into 2017

## Afternoon Investment Recovery Trade Show and Evening Reception



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# EDUCATIONAL SESSION HIGHLIGHTS : TUESDAY | MARCH 08



## Cyber Security

**Edward Stroz**, Executive Chairman, Stroz Friedburg

This session will provide a current state-of-play summary of cyber security and how the conflict between attackers and the systems they target are playing out. Also addressed will be the most vexing type of threat—the insider—and what can be done to address it. Lastly he will show how the work habits and behaviors of individuals can have a direct relationship to culture and security and what steps people should take to do their part to improve. Stroz draws on his years of professional experience with the FBI.

## Panel Discussion: Unique Opportunities for IR

**Barry Street**, CMIR, FPL/NextERA

**Art Sferlazzo**, R. Baker & Son

**Diane Englet**, CenterPoint Energy

Get an inside look into our members' IR departments and how they handle their IR responsibilities: You will hear unusual management of an asset, how the process improved, the relationship between IR/Upper Management/Community, pitfalls to avoid and more.

## The Roadmap to Success

**Scott Hunter**, CSP

Do you ever wonder why life seems so complicated and why it often seems so difficult to get what you want? This is a question people have been grappling with for centuries. Finally, here's the good news: life is really not such a complicated game. To the contrary, it's quite simple. And, when you understand how to play, you can use this knowledge to create extraordinary business success.

Learn why only 3% of people operate consistently to achieve success, and what you can start doing immediately to become one of those 3%.

## BREAKOUT SESSIONS

Each attendee picks one breakout session per hour to attend during the afternoon scheduled. There are six education choices. You may visit multiple sessions throughout the time period if you choose and if space is available.

## Yes, we have to work together, but does It have to be painful?

**Scott Hunter**, CSP

While technology is evolving rapidly, the quality of our interpersonal relations has suffered. Learn the three fundamental lessons that are critical to having open, trusting and productive relationships with fellow workers.

## The Value of Analysis & Appraisal

**Dennis Knutz**, ASA, CMIR Fellow, Investment Recovery Exchange

As a CMIR Fellow, Dennis will share his experience and knowledge of analyzing and appraising equipment. He will take us through the Analysis and Appraisal steps: • Defining the problem • Assembling pertinent data • Gathering market research (from both new and used markets) • Applying knowledge and appropriate appraisal techniques • Possessing the experience and judgment to reach an appraisal conclusion.

## Workshop: Analysis & Appraisal

**Dennis Knutz**, ASA, CMIR Fellow, Investment Recovery Exchange

OK. Enough theory. Time to get your hands dirty with this hands-on workshop. Dennis will take you through several scenarios and have you work through the analysis and appraisal using the tools shared during the previous session.

## CASE STUDY: Win-Win for Community, Environment and Economic Success

**Michelle Eldridge**, DTE Energy and  
**Jay Wilber**, Goodwill's Green Works

Michelle and Jay will share their success putting the underserved in the Greater Detroit area to work in handling the scrap wire and cable for DTE. This program is win-win for the planet and the people involved, and a triple-win by providing a return to DTE.

## Ethics and Customer Service

**David Thames**, Manager Investment Recovery, CMIR, DCP Midstream, LP

Two critical elements in every business transaction are ethics and customer service. In this context, ethics is simply doing the right thing for your business, yourself and the law. And although customer service is diminishing in this country, David will help put you back on track with steps to properly identify and communicate with your customer.

## Part 2: Still Can't Sleep? What Keeps You Up At Night?

*Facilitated by the Conference Committee*

Just in case we didn't solve ALL your pressing concerns during yesterday's "What Keeps You Up At Night?" session, we will carry over topics from Monday and entertain some new ones as well. This is a superb opportunity to present concerns, ideas and general thoughts about our challenging job

## Evening at the Houston Rodeo, special Chairman's Level Seating

*First 300 registered will be guaranteed a ticket.*

## TUESDAY EVENING RODEO—CHAIRMAN'S LEVEL SEATING

Includes unlimited food, drink, concert and round-trip transportation.

*Don't delay, only the first 300 registered will be guaranteed a ticket.*

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# EDUCATIONAL SESSION HIGHLIGHTS : WEDNESDAY | MARCH 09



## **Extended Play: IR Quick Chat**

*Key business topics to discuss and energize your morning*

The conference committee will develop pre-selected topics for you to discuss with your peers; topics such as recycling, demolition, metals, sustainability ... or maybe you can suggest one. Let us know. Each topic will be given five minutes for fast-paced discussion...and then the topics change at the bell.

## **Global Impact on Scrap Metals Prices**

*Ross Allen, Vice President, Argus Media*

Argus will present an overview of market activity in 2015 and 2016 for key energy commodities and metals markets, with a particular focus on the impact of market supply/demand fundamentals on prices. From this overview, we will turn to detailed analysis of key markets like ferrous scrap, copper, aluminum and more.

## **Panel Discussion: Implementing the "7R's"**

*Carol Espitia, CenterPoint Energy*

*Kris Waters, CMIR, Cox Communication*

*Steve Ekin, Georgia Department of Administrative Services*

What steps do YOU take when determining what to do with a surplus asset? Hear from IRA members and how they use the 7R's in their day-to-day business.



## **Lunch! Annual Meeting, Recognition and Prizes**

The final event of our conference will be the annual meeting, recognition of our new CMIRs, election to the Board and the opportunity to win prizes, including cash as well as great gifts. Don't miss this final networking session. There are plenty of flights out of Houston in the afternoon that will let you touch down before dark and be ready to go and implement at least one or two items you have picked up during this fast-paced, extensive conference and trade show.

## **Certified Manager of Investment Recovery (CMIR) Exam**

Individuals eligible to sit for the CMIR Examination must have submitted their Personal Data Forms prior to February 1, and received approval from the Association office. If you would like to begin the journey to earn your CMIR designation, please contact Jane Male, Executive Director at 816.561.5323 or Jmale@WesternEDA.com.

## **Investment Recovery Association Conference mobile App**

Join the conversation before during and after the meeting. The exclusive app can be downloaded at the Apple Store or on Google Play. Once registered and paid, you may establish your profile and begin networking, asking questions, plus just keeping in the loop of what is happening.



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# SCHEDULE AT A GLANCE:

**SUN** <sup>6</sup>  
MARCH

8:00 - 11:00 am Board Meeting

NOON Registration Opens

1:00 - 3:00 pm Committee Meetings

3:00 - 4:00 pm Board Meeting  
w/Committee Chairs

5:00 - 5:30 pm Navigation & Networking  
at the Conference

5:30 - 6:30 pm Early Arrival Networking Session  
*Informal session with cash bar  
available*

EVENING OPEN

**MON** <sup>7</sup>  
MARCH

6:30 am Registration Opens

7:00 - 7:55 am Breakfast

8:00 - 8:45 am Welcome to Houston!

8:45 am Break

9:00 - 11:00 am Leader-to-Leader

11:00 - 11:45 am IR Sustainability Best Practices

11:45 am - 1:00 pm **Lunch and IR Quick Chat**

1:00 - 1:30 pm What Keeps You Up at Night?

1:30 - 3:00 pm An Update on the U.S. Economy

3:00 - 5:30 pm **TRADE SHOW**

5:30 - 7:00 pm Reception

**TUE** <sup>8</sup>  
MARCH

7:15 - 8:15 am Breakfast

8:30 - 9:30 am Cyber Security

9:30 - 10:15 am Unique Opportunities in IR

10:15 - 10:30 am Break

10:30 am - NOON The Roadmap to Success

NOON - 2:00 pm **TRADE SHOW and LUNCH**

## **BREAKOUT SESSIONS: YOUR CHOICE**

2:00 - 3:00 pm Yes, we have to work together,  
but does it have to be painful?  
The Value of Analysis and Appraisal

3:00 - 4:00 pm Workshop: Analysis & Appraisal  
IR Case Study: DTE Energy and  
Goodwill's Green Works

4:00 - 5:00 pm Ethics and Customer Service  
Part 2 : What keeps you up at night

5:00 - 10:30 pm **RODEO AND CONCERT EVENT**

**WED** <sup>9</sup>  
MARCH

No Breakfast

8:15 - 8:45 am Extended Play: IR Quick Chat

8:45 - 9:30 am Global Impact on  
Scrap Metal Prices

9:30 - 11:00 am Implementing the 7 Rs

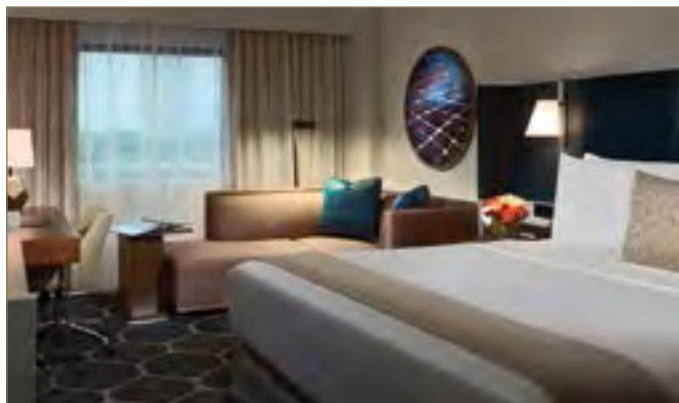
11:00 am - 12:30 pm **Lunch** with Annual Meeting,  
CMIR Recognition, and  
Door Prizes

1:30 pm **CMIR EXAM**



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# PLAN YOUR TRIP



## HOTEL ACCOMMODATIONS

The Headquarter Hotel is the Royal Sonesta Galleria in Houston, TX. You may reserve your room by calling the Reservations Department at 1-800-766-3782 by February 18th at 5 pm to receive the special conference rate of \$179 single/double, plus applicable taxes.

### Be sure to state you are with the *Investment Recovery Association 2016 Spring Conference*.

By securing your room in this block you will receive:

- Rate valid three days prior and three days after our Conference if available
- Upgraded internet speed in your guest room
- 50% off self parking rates
- Access to the fitness center

We've negotiated a special seminar rate at the hotel. The last several years, the hotel sold out completely, so book early.

### Click here for hotel reservations:

**Reserve by February 18** to receive the special rate of \$179 single/double, plus applicable taxes.

## WEATHER/DRESS

The average daytime high in March is 75° and the average low is 58°. Dress during the Investment Recovery Association conference is "business casual" attire.

## HOW TO HAVE A SUCCESSFUL CONFERENCE EXPERIENCE

- Guarantee your seat at the conference by pre-registering and paying
- Establish your profile in our *Investment Recovery Association Conference Mobile App*
- Plan to pick up your registration material (i.e. name badge) on **Sun. , March 6, Noon - 5:00 pm**
- Schedule to attend the Navigating and Networking Session beginning at **5:00 on Sun., March 6**
- First time to our Conference? Let us know on the registration form and you will be assigned a host for the event (one month in advance to be assured a host)
- Would you like to host a first timer, contact Jane Male, [jmale@westerneda.com](mailto:jmale@westerneda.com)
- Make your hotel reservation well before the deadline to guarantee the conference rate, and the room
- Engage with others at meals, breaks and during the trade show

**CLICK TO REGISTER**

# REGISTRATION



CLICK TO REGISTER ONLINE

OR COMPLETE THIS FORM AND:

CLICK HERE TO SUBMIT BY EMAIL  
jmale@westerneda.com

OR PRINT TO FAX:  
816-561-1991

OR MAIL:  
Investment Recovery Association  
P.O. Box 419264  
Kansas City, MO 64141

## CONFERENCE REGISTRATION FEE:

\$850/Member; \$1,100/Non-member

## TWO OR MORE PER COMPANY:

Save \$50 per person

## ONE-DAY REGISTRANT FEE:

\$350/Member; \$550/Non-member *Check the day(s):*

☐ Monday ☐ Tuesday ☐ Wednesday

*The one-day registrant fee includes the selected day's educational sessions, and refreshment breaks. Rodeo not included in one-day pass.*

## COMPANION REGISTRANT FEE: \$275.

The companion registrant fee includes the breakfasts, Tuesday lunch, reception and rodeo.

A Companion is a spouse or significant other, not involved in your investment recovery business or activities.

Your Name \_\_\_\_\_  
(as it should appear on badge)

Company \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

E-mail \_\_\_\_\_

Phone (\_\_\_\_) \_\_\_\_\_ Fax (\_\_\_\_) \_\_\_\_\_

☐ **Yes, reserve my free ticket for the Rodeo, Tuesday evening.\***

☐ **This is my first conference.**

Spouse/Guest Name \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

E-mail \_\_\_\_\_

Phone (\_\_\_\_) \_\_\_\_\_ Fax (\_\_\_\_) \_\_\_\_\_

☐ **Yes, reserve my free ticket for the Rodeo, Tuesday evening.\***

☐ **This is my first conference.**

Please indicate any special needs: \_\_\_\_\_

**Required:** Emergency Information. In case of emergency during conference please contact: \_\_\_\_\_

E-mail \_\_\_\_\_

Day Phone (\_\_\_\_) \_\_\_\_\_

Evening Phone (\_\_\_\_) \_\_\_\_\_

## PAYMENT

Register online, or if you prefer, return the form with a check payable to the Investment Recovery Association. We also accept MasterCard, Visa, and American Express. All fees must accompany the registration form

**Total for Registration:** \$ \_\_\_\_\_

Enclosed is my check or money order for \$ \_\_\_\_\_ made payable to Investment Recovery Association (U.S. funds only)

Please charge my: ☐ Visa ☐ MasterCard ☐ AmEx

Card # \_\_\_\_\_ Security Code \_\_\_\_\_

Expiration Date \_\_\_\_\_

C.C. Billing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Signature \_\_\_\_\_

## Important Notes on Completing This Form:

- Complete all fields. Duplicate the form as needed for additional registrants.
- List name and address as you wish them to appear on your badge and in the registration list.
- Indicate whether you are a first-time attendee.
- To make changes on your registration form, call 816.561.5323 or send e-mail to jmale@westerneda.com. Changes will not be reflected in the printed material if received after February 1, 2016.
- Refund of registration fee(s) and optional events, minus a \$100 administrative fee, will be made upon receipt of a written notice of cancellation, e-mail or fax no later than February 1, 2016.
- No refunds will be made for cancellations after February 1, 2016; however, personal emergencies will be addressed on a case-by-case basis for registration fee(s) only.
- Special events are additional costs. No refunds will be made after February 1, 2016 (unless the event is canceled).
- No refunds will be honored for no-shows.
- Registrations will not be processed until payment is received.

## On-Site Registration and Pickup of Conference Materials:

On-site registration opens on Sunday, March 6, 2016, at noon. Preregistration is not required but is strongly encouraged for quick pickup of conference materials and for your own convenience. The seminar begins with a "Networking and Navigating 101" session on Sunday, March 6, at 5:00 p.m. Educational sessions begin Monday, March 7, at 8:30 a.m. Registration will open at 6:30 a.m. on Monday and will remain open throughout the day.

*\* First 300 people to register will receive a complimentary ticket for the rodeo.*