

HOW IR PROFESSIONALS USE TECHNOLOGY

2019
Investment Recovery
Seminar & Trade Show
See Page 14
for details

*Christi Roorda, CMIR and Steve Ekin
co-presenting at the 2018 Spring Conference*



GLOBAL REDEPLOYMENT CENTER

As the Global Asset Recovery Manager at a multi-billion-dollar company, operating in 50+ countries, I often start my day by asking “Where do I begin?” This question took on a more ominous tone when I was faced with a new objective: Revitalize my organization’s Investment Recovery Program around the world. As the company’s burgeoning idle and surplus inventory steadily grew, something needed to change. ▶ [Page 4](#)



Spring Forward to the 2019 Conference in San Diego

Our conference committee didn’t take a summer vacation. They have been hard at work bringing you the very best in IR education and professional development. So make plans for your trip to the 2019 Spring Seminar and Trade Show. Check out some of these show highlights. ▶ [Page 14](#)

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PRESIDENT'S MESSAGE

THE MOST IMPORTANT QUESTION YOU CAN ASK...

When I was a kid, my poor parents had their hands full. Around my 5th birthday, I managed to scale our 6-foot wall barefoot, helping my (also barefoot) little brother climb over after me. At three, my brother was still a year out from his full-sentence first words. But trouble is the universal language and so he happily trailed behind me for the whopping three block trek to the community pool. There we were promptly thwarted in our daring plan to go swimming by a wrought-iron fence and an attentive neighbor.

In short, my parents were saints for putting up with this unrestrained bundle of curiosity. Despite the momentary worry of my occasional adventure, the worst they probably had to suffer was the never-ending stream of questions. "Why" was my very favorite, with "How, Who, Where, and What" rounding out my top five.

They were champs, teachers by nature as much as training, but even they couldn't keep up with everything I wanted to understand about the world. Exasperated, they found their solution once I learned to read. From the age of five onward, I had to write all my questions down, and save them for Saturday, when we would go to the local library branch and look up books containing the answers using the fabulous Dewey Decimal System.

I think they thought it would stem the flow; that the juice wouldn't prove worth the squeeze. They paid the price for their miscalculation several times over with me closing the library and carrying a bagful of books home to clutter the kitchen table until the next Saturday arrived with a new set of questions.

Gift or curse, that curiosity has served me well throughout my career in Investment Recovery. It helps me explore new markets and ask the right questions of both internal clients and external sales partners and buyers. "Why are we getting rid of...? Why can't we use this elsewhere? Who else can use this? How can we change our process to make Reuse work, or create less excess in the first place?"

I see that same curiosity mirrored on the faces of so many friends and colleagues across the association at board meetings and conferences, and you'll find it throughout this issue.

Paul Hoffman, fellow board officer and all-around amazing human being, who discharges his responsibilities as Treasurer with as much thoughtfulness and dedication as he has his board service from the start, shares what he learned about IR in Nairobi during his "Most Excellent" summer travels.

Continuing our Asset 2.0 Recycling Rock Star series, Ryan Conrad and Chad Russell share the ins and outs of wood recycling, and the importance of asking the right questions.

Steve Ekin shares how Georgia's Department of Administrative Services leveraged technology to implement telework throughout their organization and improve their visibility. Given the breadth of the average IR professional's role, telecommute options can offer many benefits, such as allowing employees to focus on learning more about their customer's needs, rather than rushing out the door to beat traffic. Investment Recovery technology solutions, like those shared by Christi Roorda in this issue and at the 2018 conference, can go a long way toward capturing and sharing key information on assets and sales via a global network.

Whatever projects you take on this fall, stay curious, ask the right questions, and enjoy the adventure!

Kristina Waters, CMIR
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► Continued

IT IN INVESTMENT RECOVERY TODAY:

Anytime, Anywhere, Asset Disposition



Global Redeployment Center

By: Christi Roorda, CMIR
Global Asset Recovery Manager, Praxair, Inc.

I met with colleagues from major global areas to understand their respective regional disposition processes. My goal was to create and implement a global standard organization-wide to guide each region in making the best decisions in their IR practices. I learned that the processes varied slightly from country to country but, in general, all follow a similar process of Identify, Reuse, Resell, or Dispose.

The principal difference in all our processes was the Identification step. We had been utilizing all of the following tools, and more, to identify our idle assets:

- Spreadsheets
- Multiple ERP (Enterprise Resource Planning) systems
- An EAM (Enterprise Asset Management) system
- Country or business unit specific databases
- Third-party redeployment websites

There was also a heavy reliance on the personal knowledge of key staffers who “know where to find things”—but aren’t known to keep any documentation.

The problem with utilizing different tools was apparent. Spreadsheets, although useful for data collection, are challenging to keep up to date and when widely distributed can lead to outdated or uncontrolled versions. ERP systems aren’t designed to capture the asset specific data needed to redeploy or sell. EAM systems are great for tracking maintenance on critical assets but fall short in tracking other important categories such as MRO (Maintenance, Repair and Operations) or IT Equipment. Databases specific to one region or business unit are challenging to share with others due to access issues or language barriers. Free auction vendors were brought in to track our idle assets but learned that our types of assets weren’t easily classifiable into their cookie cutter systems.

One Solution for Multiple Global Needs

The existing tools and processes needed to be streamlined into one solution that would support our business model and the need for global connectivity. In addition, redeploying and selling our idle assets did not need to be limited by geography. Enthusiastic internal feedback (and I received plenty!) provided me with exactly how this tool should operate with the following criteria:

- User-friendly
- Access to real-time data
- Asset specific fields to accurately describe the equipment
- Reports
- User specific alerts (For example, an aging asset alert was implemented to make timely decisions to sell, scrap or dispose of.)

Free auction vendors were brought in to track our idle assets but our types of assets weren't easily classifiable into their cookie cutter systems.

A major concern was the amount of time it takes for a busy employee at one of our plants to enter assets into a system. Typically, they need to walk out to the asset, take photos, write down important specifications and details, and then take it back to their office where they can sit and key it into their computer.

Armed with all of this invaluable information, I was able to conduct an RFP for the specific software that we needed to fill these gaps. I was able to work with our selected vendor to create a completely customized Global Redeployment Center. The system is accessible by any employee through our company intranet. We also created a mobile site for remote employees, that both increased time savings and decreased duplication of work.

Communication Plan – Mission Critical

To ensure that the system would be utilized quickly and efficiently, I did my due diligence in developing training materials and 'go-to' reference guides to help new users transition to the automated process. In particular, a PowerPoint tutorial with an audio narration proved to be a very effective training tool.

I did receive some initial resistance on the mobile site, as some folks prefer to take notes on the asset and return to their desk to input information to their computer. In some plant environments, it isn't safe to use mobile devices. As a solution, I created printable data sheets for our top twenty asset categories which ensured all key asset fields are considered when the employee is physically reviewing the asset (and hopefully avoiding an asset re-visit later

if something was missed).

The system launch was mission critical to its success—and it started with a strategic communication plan which included emails from various levels of management, webinars, advertisements on the intranet, articles, and link in newsletters, and live presentations at several major business meetings.

Results to Date

I am enthusiastic to report that there is growing activity in our Global Redeployment Center. To date, we have successfully redeployed assets across internal business units and regions that otherwise wouldn't have connected prior to the new system.

It's an exciting time to be leading this program and I look forward to seeing how this tool continues to transform our IR activities as our technology options continue to grow and make us more productive. ■



Technology Support for Virtual Offices

By Steve Ekin, Director, Surplus Division at GA Dept. of Administrative Services

The Surplus Property Division of the Georgia Department of Administrative Services (DOAS) is responsible for the authorization and final disposition of the state's personal property. This would include all assets from 100 state agencies, universities, colleges and technical colleges processed through our team of seven specialists. During a year, the team conducts an average of 9000 sales and disposal authorizations across the state of Georgia. Since 2008, the team works out of Atlanta as a "virtual operation." We dispose of assets-in-place through either; transfer between state entities, direct sale to local governments and eligible nonprofits, sale to the public through internet auctions or destruction. The process not only generates revenue for the state, but it also creates a transparent audit trail showing the public what happened to tax-payer funded property.

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A Perfect Storm for Change

In February 2014, a cataclysmic weather event closed down our operations for weeks. Since we process property state-wide, agencies and buyers in unaffected areas weren't sympathetic to the situation. It was a wake-up call for us.

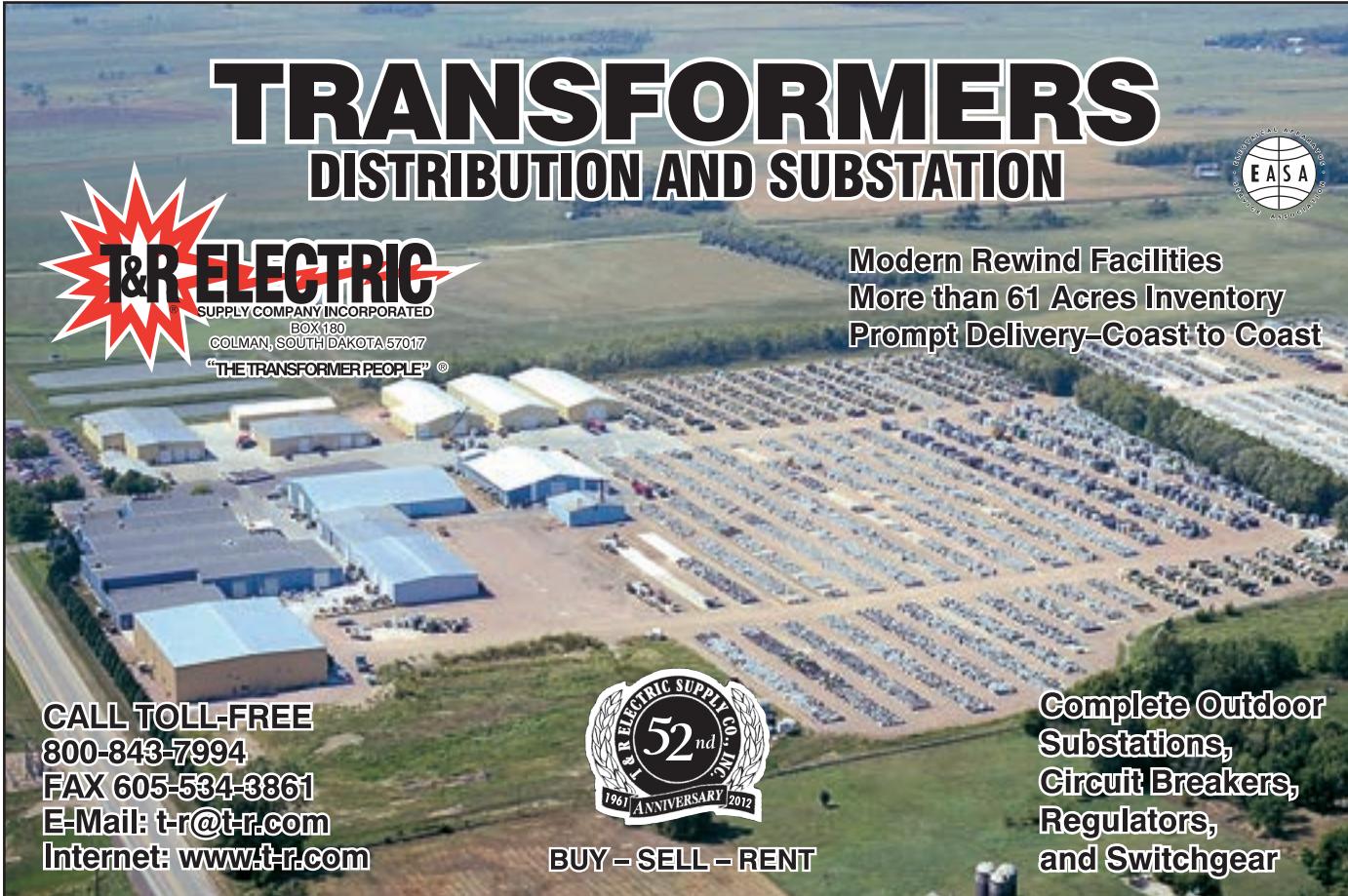
The state has been a long-term proponent of teleworking and alternative work schedules, but this was different. Could an entire government operation work completely remotely?

While our property reporting and sales platforms are web-based, we were hampered by other technology challenges. First, we used landlines that were assigned to individuals and there wasn't a seamless way to forward or transfer calls to teleworkers. Another challenge was sharing files between the team. VPN connections required additional security programs that also slowed connection rates. Finally, there was a concern about employee engagement with the team not physically collocated.

No More Ringing Phones!!!


Our first step was to implement a Voice Over Internet Protocol (VOIP) phone system. DOAS operates a call center that utilizes VOIP call center software. Since we already owned it, we simply added our department to the agreement. The software was loaded on everyone's PC and the hard lines went away! With call center dashboards, we now could see who was on a call, who could take a call and who was offline. We can transfer calls knowing that folks are available to receive them. A side benefit from a customer service perspective is that all calls are now recorded. Any issues can be reviewed by managers and there is no question about "who said what." Before—from a management perspective—we could hear phones ringing but couldn't document the actual time spent on calls. System reports give us that missing work performance data for the whole team. (Also, there are no ringing phones!)

Next, we invested in laptops for the team. Seems archaic



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to some companies, but in government circles, laptops are roughly double the cost of desktop PCs. Also, the state's telework policy requires individuals to provide their own equipment (originally intended to prevent the state from having to supply office and home equipment.) This saves in the long term. We controlled costs by not adding licenses for extra "home" units, and IT is managing the same equipment for everyone. The department has also installed WI-FI for the agency that is robust enough to support the large-scale use of wireless devices agency-wide. Now, we could work anywhere and still appear as though we were sitting in Atlanta.

Team Collaboration and Documentation Get a Boost

During this time, DOAS converted to MS Office 365, the web-based version of the Office Suite of programs which included Skype for Business. The team can keep in close contact through individual or group communications. Video conferencing enhances team collaboration by sharing real-time re-

ports. The added benefit is that we use many of these tools even if we're in the office, so everyone isn't huddled around one screen or in a conference room.

The department has utilized the SharePoint platform for many years. Another IT initiative was to convert the agency from using "shared drives" for division record keeping to an internal SharePoint site. Now, each division has a dedicated web page with all the necessary files, forms, and links for us to manage our operations. We can now check-out and check-in documents with a version history, so we know if we're working on the most current one. Additionally, there are dedicated cross-division collaboration sites for sharing documents, resources and staff calendars.

Many successful teams have been virtual for years, while others have had to rethink their remote policy. Technology does, however, give options and flexibility and can greatly enhance your business continuity, employee engagement, and customer experience. ■



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Rock Star Series:

What You May Not Know About Wood Scrap Management 101



Ryan Conrad
*Vice President,
Blackwood Solutions,
Inc.*



Chad Russell
*Director of Logistics,
Cox Recovery
Koppers Utility and
Industrial Products*

Wood scrap is scrap, right?

Wrong!

As most IR Managers know, it's so much more than hauling off those burgeoning heaps of wood from your property. And that 'so much more' has to do with environmental concerns, regulatory compliance and your company's bottom line. So whether you're a seasoned scrap pro, or just learning the scrap ropes, our ASSET 2.0 Rock Star Series have the inside knowledge on the most cost-effective wood scrap management best practices – including utility poles– in IR today.

Wood Scrap Primer – Do You Know the Basics?

Ryan: Most utilities generate 100's or 1000's of tons of wood scrap each year. Where is your scrap wood going? Do you think your company gives away "most" of your poles and landfills the rest? Investigate and you will probably discover most of your poles are going to the landfill!

In IR, most managers are tasked with trying to sell scrap material or give away scrap utility poles. But they also have the option of contracting a vendor for disposal. Wood is very expensive to landfill. Often there's a perception that

recycling is the right thing to do, but it's more costly. What our customers have discovered (considering the unique properties of wood density and bulkiness) is that it's often cost neutral or LESS expensive to adopt a wood recycling program compared to a giveaway and dumpster/landfill program. So, it pays to weigh your options.

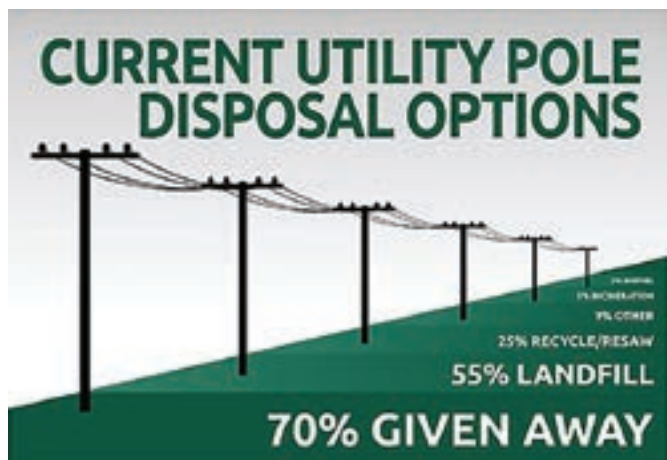
Another basic objective for IR professionals is to look for cost avoidance or cost minimization. If your company is producing a huge amount of scrap wood—consider the various expenses associated with processing it. First, your employees are handling it, which could lead to safety liability as they chainsaw poles into smaller chunks and wrestle it into the dumpster. Then the landfill vendor comes to haul it away— most likely making multiple trips to the landfill site where a tipping fee is paid. Those potential risks and costs are usually much higher than if an IR manager had opted for a turnkey wood recycling program. So, there's a great opportunity for cost and safety risk avoidance with a recycling program versus a wood landfill program.

Chad: (Utility Poles) There's a big wave of utility pole recovery work underway. The first grid of primarily creosote-coated poles went up 50 -60 years ago and are now approaching their end-of-life cycle. Add to that, natural disasters are adding to the problem as poles are coming out of the ground at a faster rate. So, the whole landfill approach is simply not sustainable.

It's estimated that around three percent of treated poles are retired from service each year, representing over three-million tons of used wood material (North Pacific Group). Stockpiling them in the yard carries added costs and risks—having employees move poles or use saws to cut them into smaller sections, exposes utilities to both additional man hours/costs and safety hazards.

What are the most common questions you hear from IR Managers?





Chad: “What are my wood scrap options?”

Options can vary depending on your wood scrap scenario. IR professionals should consider a vendor that has a broad logistics network, dedicated expertise in fluctuating state regulations and can customize a program for individual needs.

Chad: “What are the pros and cons of ‘green’ utility poles?”

Green has very little to do with being eco-friendly when it comes to utility poles. Green poles are treated with chromated copper arsenate or CCA. This is a toxic chemical preservative which gives utility poles a degree of durability as it repels termites and fungus. CCA also is responsible for the greenish tint you see in poles. Today, everybody is buying the green cheaper poles but disposing of end-of-life creosote poles. Not many green poles are coming out of the ground right now, so the full force its waste scrap will be felt in about 20 years. And maybe the technology will be evolved down the road where more cost-effective and sustainable disposition options will be available. But this is what we know to date: Green poles use water as

a carrying agent and so they have limited durability in northern climates. They freeze like concrete in the cold and then crumble and crack. In addition, the highly hazardous chemical, CCA, makes disposition difficult. You can’t burn these poles so chopping them up for fence posts is about the only option disposition available.

Ryan: “Is recycling more expensive than landfill?”

Run the numbers! When companies actually break down their process of handling and processing wood waste to make it dumpster-ready for landfill vendors—it adds up to considerable costs. Consider the labor and risk of chainsawing poles into landfill-sized chunks and then heaving the chunks into the dumpster.

And you’ve got to consider potential risk factors. This may be overlooked by IR Managers. The more your linemen handle that piece of scrap material, costs go up. For example, when a utility company brings a 30 ft. scrap pole back to their location, you’ve got a perfect storm for accidents and added costs. You can’t put a 30 ft. pole in the dumpster because the landfill companies won’t take it. So linemen chainsaw it up into smaller pieces. So, if you’re currently doing a landfill program for poles, you should really consider a recycling option instead – for long-term risk aversion, sustainability, and cost-saving benefits.

Ryan: “How will you recycle our wood?”

There are two answers to that from my company; we will “repurpose” the poles by distributing them to organizations/individuals that use the poles in re-use applications (i.e. fencing, pole barns...etc..) or, we can process the product into a wood fuel acceptable to burn at registered power-plants. If your company accumulates lots of scrap utility poles, railroad ties or heavy bulky wood items, we can grind them down into wood grindings. Power plants can then convert the wood product to create electricity. Blackwood also has recycling outlets for concrete poles, pads, and pilings.

What are the best practices in wood scrap management today?

Chad: IR managers should be taking a bigger perspective on the entire lifecycle of a pole – from purchase to final

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► Continued

disposition. By partnering with a vendor who offers this kind of comprehensive solution, companies get a cost-effective program with longer-term economic, risk mitigation and sustainability benefits.

Chad: Everybody is looking for alternatives that will save them time, money and keep them compliant with disparate state regulations. And we all know the complexities of keeping current with state compliance. What many companies don't fully realize is that 60 – 80% of their scrap management costs are simply transportation-related. That's why Cox Industries expanded into logistics where wood scrap could be taken to the right place—either to be resold for renewable energy or recycled.

Ryan: Feedback from our customers would identify the following as wood recycling best practices:

- Safe, consistent scrap wood pickup process. Our approach—and it is worth exploring all of your options— is to purchase equipment and hire expert operators for scrap wood pick-up service versus sub-contracting out these services
- Reliable, long-term recycling outlets for the material
- Proven track record in navigating legal and environmental issues

What are the biggest challenges in wood waste management in IR?

Ryan: Not breaking down the all-in costs associated with their current scrap program. Take for example utility companies that have a massive amount of end-of-life utility poles utilizing the dumpster/landfill option. Poles are brought back to the yard one at a time, chain-sawed into landfill-spec sizes, heaved into the dumpster, and the dumpster company hauls it away to the landfill (and pays a tipping fee per ton of material). This is both expensive and not necessary!

Let's add up all the costs for just one trip to the landfill. The IR manager may mistakenly look at the landfill disposal cost only—perhaps around \$60 a ton—but that's not even close to the actual cost. Just consider an example of 4 tons of poles...



Dumpster tipping fee: 4 tons x \$60	= \$240.00
Dumpster haul fee	= \$150.00
Linemen labor:	
\$35/hour x 2 Linemen x	
1 hour per ton x 4 tons	= \$280.00
Actual cost per load	= \$670.00

Chad: The biggest challenge I see is that IR practitioners don't know the big picture of the wood waste removal process. We totally understand that. They simply don't have the time to study the broad scope of asset disposition with a short time fuse. For example, we work with a table manufacturer aimed at zero waste in the landfill. They have a mixed bag of waste; wooden reels, pallets, crates, and metal co-axed cable. The problem is with the cable. Where do you find a vendor who will sort and process both? A new IR manager may not know that this is an option. We are currently working with the smaller haulers and recyclers who can adapt to this. Even if there's no monetary value separating metal from wood, it's a viable option because it supports their longer-term waste initiative. ■



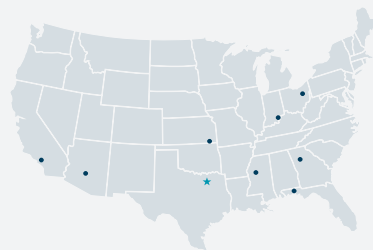
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Where were you this summer during your vacation? Maybe you caught some rays at the beach, or backpacked through the mountains, rode the monster rollercoasters or relaxed by the lake. No matter where you go to 'get away from it all,' IR professionals can't get away from observing local recycling practices. It's in our DNA, and we're darn proud of it. But what if your travels took you to someplace really exotic...like Africa? That's exactly where Paul Hoffman spent his most excellent summer vacation, and to be sure – saw firsthand how recycling is a family business. Here's his story:



Paul M. Hoffman, CMIR
*Xcel Energy, Supervisor -
Investment Recovery*

"While traveling in Nairobi, Kenya last summer with my brother Daniel and a group of his graduate students



*Weighing a sack of
metal in the scale house*



*Separating ferrous from
non-ferrous metals*

from Rutgers University, we happened upon an informal recycling business. This operation was across the highway from Kibera, the largest urban slum in Africa. The business, run by a husband/wife team along with their son, was in a yard that consisted of an area for ferrous materials, plastic and non-ferrous, creating compounds within a compound. There was a steady flow of residents from Kibera and

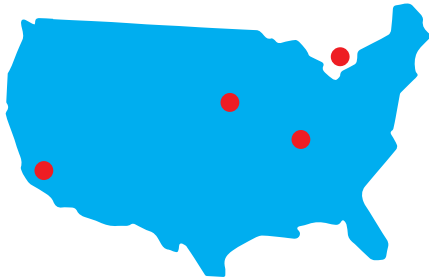
the surrounding area carrying sacks of material that were sorted and weighed using a mechanical hanging scale. Payout was made on the spot by the wife and, per the proprietor, the scrap is either trucked to consolidators or picked up by buyers for processing. This undertaking, on a stretch of land between two roads and adjacent to a housing development and maize fields, provides a livelihood for a family, in addition to a means of generating cash for the many people that collect recyclables from along roadsides and trash piles in the area." ■



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WHAT'S HAPPENIN'

News of the Investment Recovery Association

Spring Forward to the 2019 Conference in San Diego

**March 17-20, 2019,
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When it comes to planning a stellar conference, our committee didn't take a summer vacation. They have been hard at work bringing you the very best in IR education and professional development. So now is the time to make plans and budget for your trip to the 2019 Spring Seminar and Trade Show. Check out some of these show highlights:

Potential Disruptors on the Horizon for Investment Recovery: Keynote Speaker, Dr. Andy Hines

Get prepared for the future in this interactive session with Dr. Andy Hines, Assistant Professor and Program Coordinator for the University of Houston's Graduate Program in Foresight. He will introduce twenty potential disruptors for the future of investment recovery through four different perspectives: consumer, tech, business model and work. Dr. Hines has 25+ years of professional futurist experience that includes a decade's experience working inside the Kellogg Company and Dow Chemical. Learn more about Dr. Hines through his publications: Thinking about the Future (2nd edition), Teaching about the Future, ConsumerShift: How Changing Values Are Reshaping the Consumer Landscape and 2025: Science and Technology Reshapes US and Global Society.

Influencing the Future: Implications, Issues, and Options for Dealing with Change: Dr. Andy Hines

Andy will be back for a Tuesday afternoon break-out workshop. In this hands-on session, go more in-depth into one of the "winning" disruptors from the previous keynote session. Take home tools and skills to put the power of change in your hands.

The Economy, IR and You: Dr. Tatiana Bailey, Executive Director, UCCS Economic Forum

Back by popular demand, Dr. Bailey will share her expertise on how the economy will impact investment recovery in both near-term and long-term future domestic and global economic outlooks.

Take this Job and Love it!: Dr. Alan Zimmerman, CSP

Too many plates spinning in the air? You can have a life and make a living. Take away the 8 domains of the full life and tips on how to keep 'em all balanced!

Journey to the Extraordinary— How to Get the Best Out of Yourself and Others: Dr. Alan Zimmerman

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intensive, life-changing boot—camp experience, get the tools you need to reach the next level ... and beyond ... personally and professionally. As a best-selling author, keynote speaker, and authority on the topics of Leadership, Communication, Teamwork, and Attitude, Dr. Zimmerman has spoken to more than one million people in 49 states and 22 countries.

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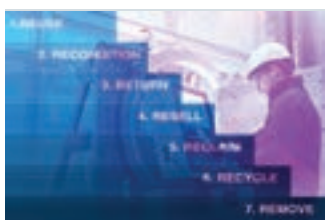
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Thursday, January 17, 2019
10:00 AM – 11:00 AM Central

When it comes to IR cost benefits in your organization...can you show how it impacts the bottom line? Do you want proven methodologies for turning 'green into gold'? Need the latest best practices and compliance updates on sustainable waste handling? Then mark this webinar as a must-attend! Whether you're just starting your career in investment recovery or are a seasoned pro, tune into this webinar for learning new skills and knowledge for adding more value to everything you do.

THE CMIR EXAM: REVISED AND RETOOLED

A big thank you goes out to these dedicated CMIRs who updated the CMIR exam content over the summer:

Anthony Taylor, *Seminole Electric*

Barry Street, *FPL*

Christopher Matza, *Fortune Metal Midwest*

Dave Halicks, *Tennessee Valley Authority*

Jennifer Hart, *Eversource*

Kelly May, *Salt River Project*

Ken Odle, *Steven Levy*

Kevin Graham, *MMR*

Kim Selby, *Dow/DuPont*

Kris Eigenbrood, *Sigma Recovery*

Mark Cauley,

Mike Beardsley, *Frontier Communications*

Miles Van Bockel, *Pacific Gas & Electric*

Reina Tse, *Pacific Gas & Electric*

Rick Siegfried, *PPL*

Tim Southwell,
Asset Recovery Management Services

Todd Thompson, *Colorado Springs Utilities*

And that's not all. Besides updating the content, we're in the process of possibly retooling the certification program to an online testing platform and learning management system. Stay tuned!

NEW MEMBERS:

The Investment Recovery Association welcomes new members. Say hello to...

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Reading, PA

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Houston TX

Associate Member

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The ideas presented in this publication do not necessarily represent the official position of the Investment Recovery Association. Techniques, concepts or approaches discussed here may not apply to your situation.

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