

# JOIN THE CONVERSATION

at the

INVESTMENT RECOVERY ASSOCIATION

**CONFERENCE & TRADESHOW**

MARCH 17-20, 2019 | SAN DIEGO





**March 17-20, 2019**  
**Sheraton Hotel and Marina**  
**San Diego**

**Join the Conversation** about the value Investment Recovery (IR) brings to your corporation's bottom line. IR reinforces your company's sustainability commitment to the community where you operate and to your investors. IR's focus has always been on the people, planet, and profit through initiatives conducted by the department and its employees. This isn't new.

The Investment Recovery Association's 7Rs are reinforced throughout the education offered during the 2018 Investment Recovery Association conference held at the *Sheraton Hotel and Marina* in San Diego, CA on March 17-20.

If you are not familiar with the 7Rs, that is reason enough to register today. This conference is the only educational conference planned by Investment Recovery professionals for Investment Recovery professionals. If you can only attend one conference, this is the conference you must attend.

**The conference is designed to:**

- Get the latest analysis on the current economy and how it will effect you and your business
- Learn about the 20 technological disruptors and their impact to Investment Recovery
- Hear and learn about plant decommissioning and safety from beginner to advance skills
- Improve and develop your leadership and interpersonal skills
- Integrate communication tactics and learn how to incorporate Investment Recovery as part of your corporation's vision
- Acquire key negotiating skills from a world leader in negotiating programs
- Hear how other professionals manage their surplus
- Visit with more than 50 vendors and understand the value of how a 3rd party can enhance your business
- Allow yourself time to share a challenge or even share something new you have discovered with your fellow IR professionals



Scan code to register  
 or click link below

**REGISTER ONLINE:**  
[www.invrecovery.org/2019show](http://www.invrecovery.org/2019show)

**The annual event with your company's bottom-line in mind**

The conference begins early and continues until well after 6 p.m. each day while keeping attendees engaged with valuable education and professional speakers while providing attendees along the way with plenty of food, drink and valuable conversation with those who get what you do every day. The registration fee is nominal compared to the value you will return to the office with.

# MONDAY MARCH 18

TRADE SHOW: 3:00PM – 5:30PM



## The State of the Economy and ITS Effects on IR

Tatiana Bailey, Ph.D.

Presentation will include a comprehensive look at the national economy including employment levels, labor participation by age group, gross domestic product (GDP), household and corporate finances, consumer and small business sentiment, stock market volatility, the national debt, the manufacturing industry, and the impact of the trade disputes. There will be a look at some more recent trends in the metals market and how the trade disputes have impacted performance in that sector.

Ms. Bailey is the Director of the UCCS Economic Forum and serves as an economic development resource to local businesses and government. She aims to inform audiences about our national and local economies and participates in initiatives that leverage the region's many assets. In 2016, Dr. Bailey was a "Woman of Influence," and in 2018, was named "Business Leader of the Year."



## Using Drones and Robots in IR

Stephen Cross,  
FPL/NextEra Energy

This presentation by *Florida Power & Light/NextEra* discusses the integration and use of drone and robot technologies in the electric utility industry. The presentation covers history, regulations, and potential future of automated utility inspections on the ground and in the air.

Stephen Cross is an emerging technology engineer at *Florida Power & Light Company (FPL)*. Mr. Cross works in the IT Digital Innovation group where he researches and implements new technologies across FPL. He has been instrumental in setting up FPL's robotics and unmanned aircraft systems (UAS) programs. The Digital Innovation team is dedicated to advancing innovation throughout FPL to improve reliability for customers, which has increased 30% over the last seven years. Mr. Cross also helps direct UAS operations as the FPL UAS coordinator during extreme weather events.



## The New Rs? Redesign and Reverse Engineering

David Peterson, Supply Chain  
Technical Services Director,  
FPL/NextEra Energy Group

In order for Nuclear Power to remain a viable option in the upcoming years, it is of paramount importance to count on solutions for dealing with equipment obsolescence and reduction of operating costs while maintaining safety and quality standards. These solutions may be realized through different scenarios such as the application of Circuit Card Repairs and Reverse Engineering for electrical and mechanical components.

*NextEra Energy* leads the industry in regard to obsolescence management and material cost reduction. Join David Peterson as he shares his experience and knowledge on this topic.

**Trade Show: 3:00 PM - 5:30 PM**



## Potential Disruptors on the Horizon for Investment Recovery

Andy Hines, Ph.D., Assistant  
Professor and Program Coordinator  
University of Houston

This interactive keynote will introduce twenty potential disruptors for the future of investment recovery. The session will kick off with a brief overview of a few conceptual tools for thinking about the future. The disruptors will then be explored in four modules: consumer, tech, biz model and work. After each module, each table will be asked to prioritize what they think will be the most impactful disruptor for the future of investment recovery. They will then identify the most important implication it suggests (would require an immediate response) as well as a more provocative one (may not happen right away, but could be important down the road.)

Dr. Andy Hines is Assistant Professor and Program Coordinator for the University of Houston's Graduate Program in Foresight and is also speaking, workshopping, and consulting through his firm Hinesight. His 25+ years of professional futurist experience includes a decade's experience working inside first the Kellogg Company and later Dow Chemical, and consulting work with Coates & Jarratt, Inc. and Social Technologies/Innovaro.

**“The Best Way to Predict the Future is to Create it.”**

# TUESDAY MARCH 19

TRADE SHOW: 11:45 AM – 1:30PM



**Take This Job and Love It!**  
**How To De-Stress, Re-Charge,  
and Re-Balance Your Life and  
Work In A Crazy-Busy World**  
*Dr. Alan Zimmerman*

The world of work has become more challenging. With more work, fewer people, tighter budgets, and less time, such things as morale, energy, and attitude often take a hit. And negativity increases. Comments such as, "It won't work here... We've always done it this way... and... That's not my job" become more familiar. The good news is you can create a positive workplace that is less stressful and more exciting... where satisfaction and fulfillment are the rule, not the exception. You can create a lifestyle that is relatively free of stress. You don't have to feel stuck, helpless, overwhelmed or exhausted... even if your work schedule is highly demanding. And you don't have to choose between your career and your family IF you apply the simple work-life balance strategies detailed in this program.

## Hard to Sell Assets

*Open Discussion*

This very popular breakout session last year, is back, but available to everyone to participate. This is your session... bring your hard to sell assets (pictures, drawings, detail) and ask those in the room for their suggestions on how to best utilize to realize the best value for

your company. Or, did you have a recent success finding a home for a hard to sell asset, share the information to those in the room in case they find themselves in the same situation down the road.

## Transportation and Rigging

*Chris Johnson, IRH*

A subject matter expert with *Intermountain Rigging (IRH)*, Chris will present the basics of proper rigging and how to safely secure a load for trucking your surplus material's its final destination. He will provide tips for when a contractor comes to your location to remove heavy equipment or large loads; how to inspect the condition of the rigging, the safety of your people, and the integrity of the loading process from cradle to grave.

## AFTERNOON: TWO TRACKS

*Feel free to move between tracks*

### TRACK ONE: Business Development

## The Journey to the Extraordinary

*Dr. Alan Zimmerman*

Why is it that some people accomplish so much while others accomplish so little? Several years of research reveal the answer. Take-charge champions have mastered a set of strategies that ensure their success in every endeavor on and off the job. You

will learn 3 strategies that will ensure your own Personal Peak Performance... with unshakable self-confidence and ability to work and win outside your comfort zone. You will also learn 3 strategies that increase your ability to build Positive Productive Relationships, relationships filled with cooperation, motivation, and trust.



**Influencing the  
Future: Implications,  
Issues, and Options for  
Dealing with Change**

*Andy Hines, Ph.D.*

This interactive working session will take one of the "winning" disruptors from yesterday's keynote and work through tools for proactively responding to it. Participants will identify implications of the disruptor using the Futures Wheel tool. From that exercise, they will identify a strategic issue of importance for the future. They will then develop a strategic option for responding to that issue using the Elevator Speech tool. The session will close with participants sharing the elevator speeches in a plenary session.

### TRACK TWO: IR Toolbox

Topics covered are pertinent if you are an Investment Recovery professional interested in improving your skill sets and for those preparing for the CMIR Exam.



## Negotiation

*Kelly May, CMIR, Salt River Project*

Kelly's presentation will share the key factors IR professionals need to know for an effective negotiation session.



## Warehousing

*Dave Halicks, CMIR,  
Tennessee Valley Authority*

Dave's presentation discusses managing the warehousing, inventory control, logistics involved, and sales & marketing of surplus goods.



## Ethics

*Ron Brooks, CMIR Fellow,  
R. Brooks Consulting*

Ethical behavior is a key to success in your IR practice. Exactly what is ethical behavior and how does it play a part in the disposition of your surplus assets.



## Sustainability

*Stacey Elliott, CMIR,  
Marathon Petroleum*

We like to say that IR is sustainability and has been in practice for decades. Using the 7Rs IR professionals have been practicing landfill avoidance and putting their recycling skills to use. Learn how sustainability and IR go hand in hand with your company's sustainability mission.

# WEDNESDAY MARCH 20

NO TRADE SHOW



## Plant Decommissioning and Contractors' Safety

Fred Maier, KCOM Environmental,  
Mike Mitchum  
Dale Gibson, Idaho Power

Facility closures and the subsequent decommissioning, decontamination and demolition that sometimes follows is a complicated process. Each stakeholder (owners, demolition and environmental contractors, as well as consultants and engineering firms) has a common goal of completing the project economically without sacrificing safety, quality and environmental protection while having their own procedures and protocols.

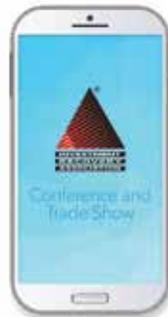
Take the guesswork out of planning and executing a successful project by hearing all sides of the equation on best practices and lessons learned from real-world projects from the perspective of the owner, contractor, and consultant. Learn to communicate in terms that everyone understands, manage costs and schedule, and build a cohesive team to maximize the chance of success.

## Understanding and Managing Your Business Relationships

Mark Hutson, Mosaic,  
Tim Cimperman, Amlon Resources  
Andrew DeBaise, Rocky Mountain Recycling

IR professionals have internal and external relationships. What are the checks and balances to be sure both sides are not being taken advantage or taken for granted.

## Investment Recovery Association Conference App



Join the conversation before, during and after the meeting. The exclusive app, *Whoova*, can be downloaded at the Apple Store. Once you register and pay the fee, you may establish your profile and begin networking, asking questions and just stay in the loop of what's happening.

\*Speakers and topics subject to change

## GENERAL INFORMATION



## Face-to-Face Study Group Saturday, March 16 at 3:00 pm

If you are not ready to take the exam on March 17, but want to get a jump start for 2020, don't worry, you are still welcome to join us for the Study Group.

## Make Your Hotel Reservations Sheraton San Diego Hotel & Marina 1380 Harbor Island Dr San Diego, CA 92101, US

The sleeping room rate is \$195 plus applicable taxes. Included with your sleeping room is complimentary airport shuttle, basic WiFi, fitness center access and discounted self-parking \$22 rate per day. You will not be assessed a resort fee. If you wish to have the other items included in a resort fee, those are available ala carte.

To make your reservation, click the hotel link on our website, [www.invrecovery.org/2019show](http://www.invrecovery.org/2019show), or call: 619-291-2900 and state you are with the Investment Recovery Association to receive our special rate.

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

On-site registration opens on Sunday, March 17, 2019, at noon. Preregistration is not required but is strongly encouraged for quick pickup of conference materials and for your own convenience.

Educational sessions begin Monday, March 18, at 8:00 a.m. Registration will open at 6:30 a.m. on Monday and will remain open throughout the day.



Scan code to register  
or click the link below

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## QUESTIONS?

Please call 816.561.5323, or email:  
Jane Male, Executive Director,  
[admin@invrecovery.org](mailto:admin@invrecovery.org)

Or, Kim Weitzel, Asst. Director  
[kweitzel@westerneda.com](mailto:kweitzel@westerneda.com)

## +1 PROMOTION:

For a limited time, you can receive TWO FREE registrations for you and a qualified member company. Details at [invrecovery.org/plus1](http://invrecovery.org/plus1)



# SCHEDULE OF EVENTS

REGISTER ONLINE:

[www.invrecovery.org/2019show](http://www.invrecovery.org/2019show)



| SATURDAY, 3/16  | MONDAY, 3/18   | TUESDAY, 3/19   | WEDNESDAY, 3/20  |            |  |   |  |   |                                 |   |  |  |
|---|--|---|--|------------|--|---|--|---|---------------------------------|---|--|--|
| <p><b>9:00 am</b> BOARD MEETING</p> <p><b>3:00 pm</b> <b>CMIR STUDY GROUP</b><br/><i>A Q&amp;A session to help individuals prepare for the Sunday morning exam.</i></p>   | <p><b>6:30</b> REGISTRATION OPENS</p> <p><b>7:00 – 8:00 am</b> BREAKFAST/NAVIGATING AND NETWORKING</p> <p><b>8:05 – 9:30 am</b> THE STATE OF THE ECONOMY AND ITS EFFECTS ON IR<br/>Tatiana Bailey</p> <p><b>9:30 – 9:45 am</b> BREAK</p> <p><b>9:45 – 10:30 am</b> USING DRONES AND ROBOTS IN IR - Florida Power &amp; Light</p> <p><b>10:30 – 11:15 pm</b> NEW RS! REDESIGN AND RE-ENGINEER<br/>Florida Power &amp; Light</p> <p><b>11:15 – NOON</b> ANNUAL MEETING</p> <p><b>NOON – 1:30 pm</b> LUNCH/NETWORKING</p> <p><b>1:30 – 3:00 pm</b> POTENTIAL DISRUPTORS ON THE HORIZON FOR INVESTMENT RECOVERY<br/>Andy Hines</p> <p><b>3:00 – 5:30 pm</b> <b>TRADE SHOW</b></p> <p><b>5:30 – 7:00 pm</b> WELCOME RECEPTION</p> | <p><b>7:00 – 8:00 am</b> BREAKFAST</p> <p><b>8:00 – 10:15 am</b> TAKE THIS JOB AND LOVE IT!<br/>Dr. Alan Zimmerman<br/><i>(How to keep your balance in a stressed-out world)</i></p> <p><b>9:15 – 9:30 am</b> BREAK</p> <p><b>10:15 – 11:00 am</b> HARD TO SELL ASSETS<br/><i>(Audience brings examples)</i></p> <p><b>11:00 – 11:30 am</b> TRANSPORTATION &amp; RIGGING<br/>Chris Johnson, IRH</p> <p><b>11:45 – 1:30 am</b> <b>TRADE SHOW / LUNCH</b></p>   | <p>No Breakfast. Coffee and soft drinks will be available all morning</p> <p><b>8:30 – 10:15 am</b> PLANT DECOMMISSIONING AND CONTRACTOR SAFETY<br/>Fred Maier, KCOM;<br/>Mike Mitchum, CMIR, AECOM;<br/>Dale Gibson, Idaho Power</p> <p><b>10:15 – 11:30 am</b> QUALIFYING YOUR BUSINESS RELATIONSHIPS<br/>Mark Hutson, Mosaic;<br/>Tim Cimperman, Amlon Resources;<br/>Andrew DeBaise,<br/>Rocky Mountain Recycling</p> <p>Departure</p> |            |  |   |  |   |                                 |   |  |  |
| <p><b>SUNDAY, 3/17</b></p>  |  |   |  |            |  |   |  |   |                                 |   |  |  |
| <p><b>8:00 - 11:00 am</b> BOARD MEETING</p> <p><b>9:30 - NOON</b> EXAM  <b>CMIR</b><br/>CERTIFIED MANAGER OF INVESTMENT RECOVERY</p> <p>For more information about CMIR visit:<br/><a href="http://invrecovery.org/knowledge-center/cmirt">invrecovery.org/knowledge-center/cmirt</a></p>               |  |   |  |            |  |   |  |   |                                 |   |  |  |
| <p><b>NOON</b> REGISTRATION OPENS</p> <p><b>1:00 - 3:00 pm</b> COMMITTEE MEETINGS</p> <p><b>3:30 - 4:30 pm</b> BOARD MEETING W/COMMITTEE CHAIRS</p> <p><b>4:30 - 6:00 pm</b> EARLY ARRIVAL NETWORKING SESSION - INFORMAL SESSION<br/><i>(cash bar available)</i></p> <p><b>6:00 pm</b> EVENING OPEN</p> |  | <p><b>TUESDAY BREAKOUT SESSIONS:</b> <i>Feel free to move between tracks</i></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="background-color: #008000; color: white;">TRACK ONE:</th> <th style="background-color: #008000; color: white;">TRACK TWO:</th> </tr> </thead> <tbody> <tr> <td><b>1:30 – 3:00 pm</b> THE JOURNEY TO THE EXTRAORDINARY<br/>Dr. Alan Zimmerman<br/><i>(How to get the very best out of yourself and others)</i></td> <td><b>1:30 – 2:00 pm</b> NEGOTIATIONS<br/>Kelly May, CMIR</td> </tr> <tr> <td><b>3:00 – 4:30 pm</b> INFLUENCING THE FUTURE<br/>ANDY HINES<br/><i>(Implications Issues and Options for Dealing with Change)</i></td> <td><b>2:10 – 2:40 pm</b> WAREHOUSING<br/>Dave Halicks, CMIR</td> </tr> <tr> <td><b>4:30 - 5:30 pm</b> RECEPTION</td> <td><b>2:50 – 3:20 pm</b> ETHICS<br/>Ron Brooks, CMIRF</td> </tr> <tr> <td></td> <td><b>3:30 – 4:00 pm</b> SUSTAINABILITY<br/>Stacey Elliott, CMIR</td> </tr> </tbody> </table> | TRACK ONE:   | TRACK TWO: | <b>1:30 – 3:00 pm</b> THE JOURNEY TO THE EXTRAORDINARY<br>Dr. Alan Zimmerman<br><i>(How to get the very best out of yourself and others)</i> | <b>1:30 – 2:00 pm</b> NEGOTIATIONS<br>Kelly May, CMIR | <b>3:00 – 4:30 pm</b> INFLUENCING THE FUTURE<br>ANDY HINES<br><i>(Implications Issues and Options for Dealing with Change)</i> | <b>2:10 – 2:40 pm</b> WAREHOUSING<br>Dave Halicks, CMIR | <b>4:30 - 5:30 pm</b> RECEPTION | <b>2:50 – 3:20 pm</b> ETHICS<br>Ron Brooks, CMIRF |  | <b>3:30 – 4:00 pm</b> SUSTAINABILITY<br>Stacey Elliott, CMIR |
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\* Speakers and topics subject to change