

USA Chapter Update

From the USA Chapter Committee Chair

A Big Year for Asset Management

The theme of this year's North American Conference says it all.

We have seen so many changes in asset management this year from the revised ISO 55000 & 55001 Asset Management standards to the revised GFMAM Asset Management Landscape and IAM Anatomy.

Asset Management is all about setting up systems for continuous improvement and Asset Management standards and knowledge development also need to continuously improve as we have seen this year. With that looking to the future there are many ways for each of you to get involved in the IAM to help grow knowledge and support continuous improvement of the organization and the Asset Management community.

Many volunteer opportunities are included on the IAM website: <https://theiam.org/membership/volunteer-now/> you can also volunteer to support your local branch, develop a new branch if you do not have one in your area, present at meetings, help with webinars and each year there is an opportunity to submit to join the IAM USA Executive Committee through self-nomination.

IAM USA Executive Committee Nominations

- Are you interested in shaping the future of IAM USA?
- Have you been a member of the IAM and actively involved (e.g., Branch Leader, Technical Committee Member) in USA Chapter initiatives for at least a year?
- Do you have the designation MIAM or FIAM?

If you answered yes to these questions, then you should consider nominating yourself to be on the IAM USA Chapter Committee.

The USA Chapter Committee has overall responsibility for financial management, strategic direction and working with IAM Centre and other activities of the Chapter and its Branches.

The USA Chapter Committee is comprised of eight members who each serve a two-year volunteer term. At the end of the two-year term, Committee members can choose to self-nominate for reelection or not. To maintain continuity, only half (four) of the committee members end their terms each year (meaning half of the committee positions are open in any given year).

If you are interested in self-nominating for one of the positions serving the 2025-2027 USA Chapter Committee term, please provide the following information to Tammy Whipple (tammy.whipple@usa.theiam.org) by 9pm PT December 7, 2024. Nominations received after 9pm PT on Saturday, December 7 will not be considered.

- Name
- Number of years you have been an IAM member (provide member number, if possible)
- Indicate if you are MIAM or FIAM
- Brief description of your recent involvement in IAM USA
- Brief nomination statement, describing why you want to be on the USA Chapter Committee

Nomination information will be reviewed by the Nominations Committee, which is comprised of the Chapter Committee members who will serve another year. If the number of qualified candidates exceeds the number of vacancies, the Chapter will hold an election. Per IAM bylaws, only Members (MIAM) and Fellows (FIAM) have voting rights.

If you have any questions about volunteering, please reach out to any of the IAM-USA Executive Committee members. Many of us will be at the North American Conference October 21-24 in Denver, CO and are happy to talk about opportunities in-person. We also would like to invite each of you to join us at the IAM-USA Meet and Greet on October 21.

Have an impeccable rest of your summer

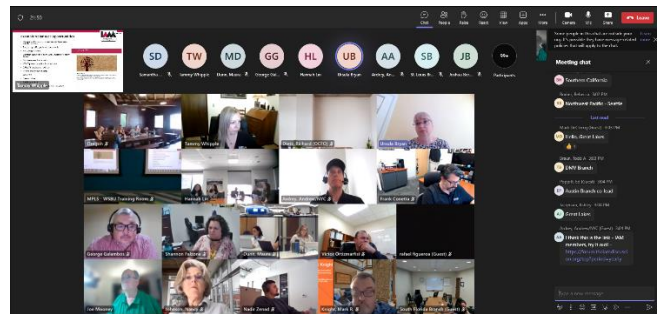
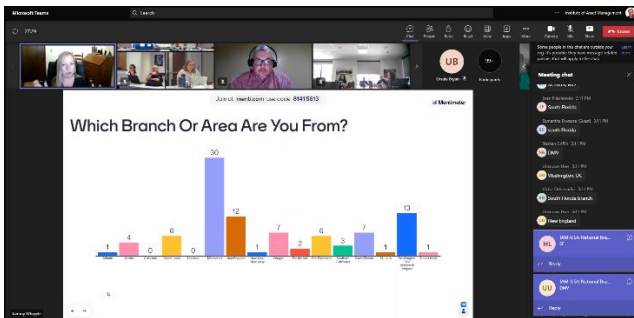
Cheers,

Tammy

Tammy Whipple, AMP
IAM USA Chapter Chair

National Branch Meeting

The USA Chapter’s National Branch Meeting was held in June and by all counts, it was a great success. Well over 100 members “Teamed” in from branches across the nation. George Galimpos and Joe Mooney of the Chapter Executive Committee presented the IAM Digital Use cases, explaining how they can be used and built upon for your own digital asset management solutions. The participants also enjoyed a presentation from David Kraft of NYC MTA and the USA Chapter Committee and how they are using data to prevent potential failures at the MTA.



A reminder to all participants...always assume that someone is going to take a screen capture of the faces in play. Some of you owe me a beer for the pictures I did not publish..... 😊

IAM North American Conference 2024 – A Big Year for Asset Management

The program is set, the speakers are ready, all that is left is for you to book your place at the conference and be prepared to be wowed by the knowledge, expertise, and energy that the IAM USA and Canada are bringing to Denver. If you are an asset management professional or practitioner, there is no better place to share, learn, and expand your knowledge and skills than at these 4 days in October in Denver.

So much has happened this year as ISO has updated and expanded their Asset Management standards. Representatives from IAM and from the ISO TC-251 Committee will be in Denver to explain what has changed and how it impacts you and your asset management journey. Authors of the GFMAM Landscape, the IAM Anatomy, and the ISO standards will be in attendance and prepared to answer your questions.

We will also have a wealth of asset owners in attendance, sharing what has worked, and what has not, in their pursuit of asset management proficiency and excellence. We will also be presenting the IAM North American Asset Management awards to the most deserving organizations and individuals. And our NxtGen feature is always a highlight as the grey hairs learn a thing or two from the next generation of asset management professionals.

Don't miss out! The Conference has sold out two years in a row and we expect it do so again. Check the IAM Website for the program details and information on hotel accommodations.

<https://theiam.org/events/iam-north-american-conference-2024/>

The IAM Discussion Forum

Do you have a question about Asset Management? Are you seeking some free advice on an issue you have encountered? Better yet, do you like to share your expertise with others in the profession who may not have your level of experience? The IAM Discussion Forum needs you!

The Forum is the IAM's interactive knowledge base, permitting anyone who is registered with the IAM website to post a question – or answer one. There are hundreds of topics out there, and hundreds of asset management professionals who have taken the time to share opinions, ideas, and solutions that might just help you solve your problem. Check it out! And become a regular contributor.

<https://forum.theiamdiscussion.org/>

SMRP Reciprocal Benefits

The Society for Maintenance and Reliability Professionals are our asset management cousins and they offer reciprocal benefits to IAM members. This means that if you are a paying member of The IAM, you have a free membership to SMRP. And if you are a paying member of SMRP, you have a free membership to the IAM. If you would like to take advantage of this benefit, contact your Branch Leader. If you are not affiliated with one of the USA branches, feel free to contact me.

Joe Mooney (Joe.Mooney@USA.TheIAM.org)

Achieving Sustainability through Asset Management

There are three key challenges facing global sustainability efforts, whether we talk of these efforts in broad terms as ESG or break them into more detailed categories such as the UN Sustainable Development Goals. Those challenges are:

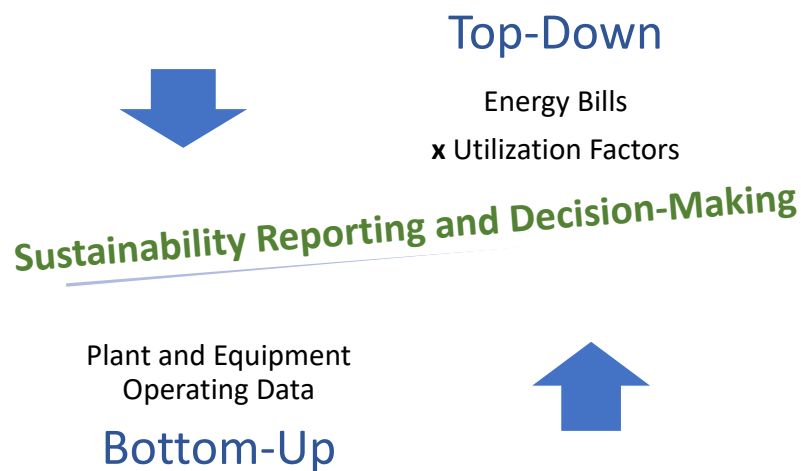
- 1) the definition and measurement of sustainability,
- 2) integration of the individual measurements of sustainability, and most importantly for asset management
- 3) a path to achievement.



In the May newsletter, I wrote about the emergence of the Six Capitals as the go-to framework behind sustainability measurement, reporting and regulation. Since that time, the framework has picked up steam and there are now 90 countries with reporting requirements based on this framework and another 30 countries that accept it as an alternative. Reporting elements which include human capital and social capital are being added to the previous focus on GHG and natural capital.

Asset Management is a framework for analysis and decision making and includes strategy and policy formulation. What it brings to the table is an opportunity to achieve sustainability from both a top-down focus on strategy and policy and a bottom-up focus on operations.

Two Approaches to Reporting, Regulation and Action



We need both and they need to be continually evaluated and balanced. The bottom-up approach requires operations data, which is ideally aligned across the organization to support decision-making. This bottom-up approach is more difficult to develop and implement than a top-down approach based on fuel and utility bills, but ultimately more concretely useful in strategy development. It is also potentially more accurate in accounting

along a value chain, such as is required in Scope 3 carbon reporting. If done correctly, real data can be passed from one organization to another avoiding gaps and double counting. A recent paper by the Science Based Targets initiative suggests that we will need to dig down to operational data to achieve Scope 3 goals.

The idea is to measure how “operational expenditure is directed towards and revenue is derived from entities, activities, commodities, products and services that have achieved a level of emissions performance compatible with reaching net-zero emissions.”.

Real data on operations goes beyond reporting to allow for development of detailed, organization-specific strategies for mitigation and resiliency. It also helps to avoid *double counting*, which is a known problem in Scope 3 assessments and is troublesome because it damages the credibility of sustainability reporting.

ISO TC251 has formed a Technical Group (TG3) on sustainability and asset management. This group is working on two projects: a PAS on sustainability and asset management, and a Workshop on the asset management solution to sustainability. Steve Wyton is the chair of this group, which currently includes members from the US, UK, Canada, France, Australia, India and the Netherlands. More are always welcome

Understanding and engaging in the use of asset management in achieving true sustainability is both an opportunity and a responsibility for all of us.

Tom Smith

Tom welcomes your comments and feedback in the IAM Discussion Forum:

<https://forum.theiamdiscussion.org/t/achieving-sustainability-through-asset-management-from-tom-smith/1593>

Welcome to the South West Florida Branch!

The USA Chapter welcomes Nancy Gallinaro and Tara Brady as Co-Leads for the newest branch in South West Florida. Nancy Gallinaro has over 40 years in the Water and Wastewater Industry. She is currently the Utility Director for the City of North Port Florida, the second fastest growing city in the country. Tara is the Asset Manager for the Charlotte County Board of County Commissioners and has over 20 years of government experience including management of Municipal Service Benefit/Taxing Units, budgeting, project management, public/media relations, department supervision and administrative work.



Upcoming IAM USA Chapter Events

Great Lakes Virtual Branch Meeting

Topic: Updates to ISO, IAM, and GFMAM Documents

Date: August 21, 2024

Time: 1300 – 1430 EDT

Location: On-Line – MS Teams (See IAM Website for details)

Agenda:

- *Welcome (Mark DeClercq, Jon Schwichtenberg, Margaret Gadzic, and Laith Alfaqih, Co-chairs of Great Lakes Branch)*
- *Announcements (Margaret Gadzic, Great Lakes Co-Chair)*
- *Presentation – New Asset Management Reference Material*
- *Q&A*
- *Group Discussion*

Carolinas Quarterly Branch Meeting

Topic: Asset Management – Chaos to Control (Josh Parker, Asst. Director for Asset Management, UNCC)

Date: August 22, 2024

Time: 1500 – 1815 EDT

Location: Charlotte Water, 5100 Brookshire Ave, Charlotte, NC 28216

Note: Gate is closed and locked at 1800. If attending, you must be inside gates before 1800.

Agenda:

- *Welcome introductions*

- *IAM updates & knowledge briefing*
- *Speaker presentation*
- *Questions*
- *Closing thoughts*

[Austin Branch Meeting](#)

Topic: City of Austin Organization Changes to Asset Management Department (Adam Bailey)

Date: August 29, 2024

Time: 1500 – 1600 EDT

Location: Austin City Limits, Room 1905, 111 Congress Ave, Austin, TX

(Also available as MS Teams Virtual Meeting - See IAM Website for details)

Agenda:

- *Branch Update*
- *Knowledge Share & Case Studies*
- *Networking and Happy Hour (Ellis, 2nd & Congress)*

[Minnesota Branch Meeting](#)

Topic: Updates to ISO, IAM, and GFMAM Documents

Date: September 12, 2024

Time: 1300 – 1400 CDT

Location: WSB, 701 Xenia Ave, Suite 200, Golden Valley, MN

(Also available as MS Teams Virtual Meeting - See IAM Website for details)

Due to security standards for Zoom virtual meeting, participants must email Brett Anderson to secure password:
brett.anderson@minneapolismn.gov

Agenda:

- *Welcome and Safety Minute*
- *Presentation*
 - *Minnesota's Next Asset Management Step, the Minnesota Advisory Council on Infrastructure (MACI)*
 - *MIC – Introduction, Ryan Laruwe, Michigan Infrastructure Council (MIC)*
- *Discussion/Questions*
- *Breakout session*
- *Announcements*

[Atlanta Branch Meeting](#)

Topic: Hartsfield Airport Asset Management Journey

Date: September 12, 2024

Time: TBD

Location: TBD

Details will be available on the IAM Website soon.

[NY/NJ Branch Meeting](#)

Topic: Updates to ISO, IAM, and GFMAM Documents

Date: September 24, 2024

Time: 1600 – 1715 EDT

Location: Virtual Meeting via MS Teams (See IAM Website for details)

Agenda:

- *Welcome & Ice Breakers - Ilya Yermolenko NYPA*
- *Introduction: Introductions of each panellist*
- *Panel Discussion: Mobility in the field – Digitizing Captured data from the field - Ilya Yermolenko, NYPA*
 - *Serisha Boyett (NYPA) - Lead Asset Analyst*
 - *David Morgia (NYPA) - Asset Control Specialist*
 - *Bob Fyke (ConEd) - ConEd of New York*
- *Closing: Future Topics and Events of Interest - Ilya Yermolenko, NYPA*

[IAM North American Conference](#)

Once again the IAM USA and Canadian Chapters partner to provide 4 days of intense asset management material. Don't miss this annual opportunity to learn, demonstrate, and network.

Topic: A Big Year for Asset Management

Date: October 21 - 24, 2024

Time: 0800 – 1600 MDT daily

Location: The Westin Denver Downtown, 1672 Lawrence St. Denver, CO

Conference Tracks:

- **Organizational asset management transformation**
Asset management practices are always evolving. Shine a spotlight on transformation through changes in organizational structure, approach to stakeholders, and asset management capabilities.
- **Risk analysis and organizational impacts**
Data analysis and techniques to leverage this analysis are rapidly changing the decisions organizations make. Share stories of data usage and strategies to achieve outcomes beyond "worst first" capital and maintenance prioritizations.
- **Innovation and the future of asset management**
Discover today's innovations that represent the future of asset management. Innovation includes changes in technology or culture that impact service delivery and the users of infrastructure assets.

Program available on the IAM Website: <https://theiam.org/events/iam-north-american-conference-2024/>

[USA Chapter Annual General Meeting](#)

Topic: State of the Chapter

Date: January 8, 2025

Time: 1400 – 1600 EST

Location: Virtual Meeting via MS Teams

This is a meeting required by our bylaws. The Chapter Chair and Executive Committee will review the results of the election of Executive Committee members and will review the strategy and plans for the upcoming calendar year. Additional details will be communicated as they are finalized.

Note: Branches are urged to schedule a local meeting for the second half of the AGM.

IAM USA Asset Management Professionals

The Asset Management Professional designation is the highest honor someone in our industry can receive from the IAM. The IAM USA Chapter is happy to put the AMP Spotlight on Kristyl Horton and Jonathon Okafor, our two newest Asset Management Professionals. Kristyl is a Senior Consultant, Asset Management with Marine Tiger Technologies previously developing strategic plans for Bay Area Rapid Transit (BART). Jonathon is the Deputy Director at Prince William Water, in Woodbridge, VA. Congratulation Kristyl and Jonathon on this great achievement!

Name	State	Nearest Branch
Len Caputo	New York	NYC
Lou Cripps	Colorado	Colorado
John Daly III	Michigan	Great Lakes
Fabiola De Carvalho	Texas	Austin
Mark De Clercq	Michigan	Great Lakes
George Galambos	Georgia	Atlanta
Craig Gotthardt	Texas	Austin
Kristyl Horton	California	Bay Area
Nancy Johnson	Massachusetts	New England
Martin Jones	Georgia	Atlanta
Mark Knight	Massachusetts	New England
Bob Leitch	Maine	New England
Amy Lindblom	Washington	Pac NW
Tom Myers	North Carolina	Carolinas
Jonathan Okafor	Virginia	DMV
Christian Roberts	Virginia	DMV
Simon Smith	New York	NYC
Tammy Whipple	Washington	Pac NW
Matthew Wood	Texas	Austin

IAM USA Contacts

USA Branch	Branch Lead/Contact	Email
Atlanta	Bridgette Beato Aaron Davis	Atlanta@USA.theIAM.org
Austin	Martin Tower Suzie Heap	Austin@USA.theiam.org
Bay Area	Andy Yang Adam Butler	Bay@USA.theIAM.org
Carolina Branch	Marcus King Wayne Francisco, MIAM	Carolina@USA.theIAM.org
Colorado	Robert Mosbey Chris Senesi	Colorado@USA.theIAM.org
DC/Maryland/Virginia	Ahmet Ozman, MIAM	DMV@USA.theIAM.org
Great Lakes	Mark A. De Clerq, AMP Jon Schwichtenberg	GreatLakes@USA.theIAM.org
Houston	Steve Morris	Houston@USA.theIAM.org
Minnesota	Craig Edlund Brett Anderson	Minnesota@USA.theIAM.org
New England	Maura Dunn	NewEngland@USA.theIAM.org
New York/New Jersey	Shawn Lenahan Illya Yermolenko	NewYork@USA.theIAM.org
Oregon	Chet Hagen, MIAM Nikki Nowack	Oregon@USA.theIAM.org
Pacific North West	Rebecca Borker Jaclyn Knoth	Pacificnw@USA.theIAM.org
Southern California	Nasrin Nasrollahi Kambiz Rasoulkhani	SouthernCalifornia@USA.theIAM.org
South Florida	Melody Tungol, MIAM	Florida@USA.theIAM.org
South West Florida	Nancy Gallinaro, Tara Brady	SWFlorida@USA.theIAM.org
St. Louis	Sheila Hockel	StLouis@USA.theIAM.org

USA Executive Committee	Held by	Email
Country Vice President	Thomas Smith, FIAM	Thomas.Smith@USA.theIAM.org
Chair and Secretary of Chapter (Officer)	Tammy Whipple, AMP	Tammy.Whipple@USA.theIAM.org
Deputy Chair (Officer)	Mark Knight, AMP	Mark.Knight@USA.theIAM.org

USA Executive Committee	Held by	Email
Director of Strategy	David Kraft, MIAM	David.Kraft@USA.theIAM.org
Director of Communications	Joe Mooney, MIAM	Joe.Mooney@USA.theIAM.org
Director of Knowledge Development	Tom Myers, AMP	Tom.Myers@USA.theIAM.org
Director of Diversity, Equity, and Inclusion	Katty Fleming, MIAM	Katterinne.Fleming@USA.theIAM.org
Co-Director of Membership and Branch Development	Andrew Ardrey, MIAM	Andrew.Ardrey@USA.theIAM.org
Co-Director of Membership and Branch Development	George Galambos, AMP	George.Galambos@USA.theIAM.org

USA National Contacts	Leads	Email
NxtGen	Charlotte Tang	NxtGen@USA.theIAM.org
Women in Asset Management (WiAM) North America	Amy Lindblom, AMP	WIAM@USA.theIAM.org
Women in Asset Management (WiSM) North America Mentoring Program	Anca Popa Katty Fleming, MIAM	Anca.popa@ttc.ca Katterinne.Fleming@USA.theIAM.org
USA Members Representative to IAM Council	Mark De Clerq	Mark.declercq@USA.theIAM.org

Social Media – Follow IAM USA on Linked In:

Our Linked In groups periodically share articles of interest beyond the IAM news. If you come across something that you feel is worth sharing, please consider sharing it via one of our LinkedIn Groups.

- IAM USA: <https://www.linkedin.com/groups/8259429>
- The IAM Discussion Group: <https://www.linkedin.com/groups/965657/>
- IAM USA NxtGen Discussion Group: <https://www.linkedin.com/groups/8792401/>