

NIA | News

THE OFFICIAL NEWS PUBLICATION OF THE NATIONAL INSULATION ASSOCIATION® (NIA)
REPRESENTING THE MECHANICAL AND SPECIALTY INSULATION INDUSTRY

ISSUE 1 2024, VOL. 31

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NIA | **68th Annual Convention**
Naples, Florida 
April 17–19, 2024 **Better Together**



NIA's
6th Silent
Auction!

Early-Bird Registration
Deadline: March 15

NIA | National Insulation
Association®

EVP/CEO MESSAGE

But Wait, There's More!



As we put the finishing touches on the planning of our upcoming 68th Annual Convention and Silent Auction in Naples, I'm getting excited to see everyone April 17–19 at the Naples Grande Beach Resort. We always track registrations very closely and have been thrilled to see so many of you registering at the early-bird rate and claiming rooms in our very discounted room block. Haven't registered yet? There is still time! Early-bird rates end very soon on March 15. Turn to page 8 to check out the latest education, training, and networking events we have in store for you. As NIA President Laura Dover has emphasized all year long, we are **Better Together**, and it won't be the same without you there!

We are thrilled to reveal we passed the threshold of 1,000 unique users during the first full year of our on-demand Education Center! We literally could not have reached this milestone without our members and subject matter experts who contributed their expertise to the development of more than 60 educational modules. There is always something new—turn to page 12 to get the latest updates.

A HUGE part of how NIA can be the go-to education resource is through the financial support of the Foundation for Mechanical Insulation Education, Training, and Industry Advancement (Foundation). The Foundation Board members have introduced the Legacy Circle Endowment Fund as a new way to make an impact. Turn to page 19 to learn more, and I invite all Convention attendees to the Foundation Town Hall on April 18 for an open discussion about the Foundation's objectives past, current and future.

And on Friday, April 19, we have our highly anticipated 6th Silent Auction with proceeds benefiting both the Foundation and Sunshine Kids, an organization that provides amazing experiences to kids with cancer. Our previous Silent Auctions have proven how generous our members are for the causes we all care about—it is a testament to your kindness and support. If your company has not yet made a tax-deductible donation to the Silent Auction, I invite you to donate by March 25. We have a new online donation system that makes it even easier to be part of this fabulous event!

Another way our members are generous is through sharing their time and talents with the next generation. Turn to page 16 to read a few highlights from our Young Professional Advisory Committee Mentor Program pairing with PCI's Rick Sutphin and Luse Contracting's Ashley Luse DeBoer.

NIA LEADERSHIP

Executive Leadership

President

Laura Dover, *Dover Insulation, Inc.*

President-Elect

Jack Bittner, *Johns Manville*

Secretary/Treasurer

Rick Sutphin, *Performance Contracting, Inc.*

Assistant Treasurer

John Stevens, *Thermal Solutions, Inc.*

Immediate Past President

Joseph P. Leo, Jr., *Atlantic Contracting & Specialties, LLC*

Counsel

Gary Auman, *Auman, Mahan, and Furry*

NIA Executive Vice President/Chief Executive Officer

Michele M. Jones

Board of Directors

Regional Representatives

CSIA—Brian Willett, *Gribbins Insulation Company, Inc.*

ESICA—Rick Baptista, *Irex Contracting Group*

MICA—Matt Hymer, *Midwest Materials Company*

SEICA—Matt Caldwell, *Caldwell Insulation, Inc.*

SWICA—David B. Patrick, *Specialty Products & Insulation*

WICA—Shawn Reichenbach, *Performance Contracting, Inc.*

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R. Dean Burows, *DKB, Inc.*

Rob Elsey (Associate), *Cornerstone Sales, Inc.*

John K. Freeman, *Petrin, LLC*

Mike McCowan, *L.C. Insulations, Inc.*

Marc Napolitano, *Insulation Materials Corporation*

Jon Perry, *Specialty Products & Insulation*

Past President Advisors

David J. Cox, *Owens Corning*

Dana VlK, *Retired*

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2024 Convention Planning

Jack Bittner, *Johns Manville*

Merit Contractors

Mike McCowan, *L.C. Insulations, Inc.*

Associates

Sandy Shattles, *Armacell*

Metal Building Laminators

David Tomchak,
Bay Insulation Systems, Inc.

Distributors/Fabricators

Matt Calmeyn,
Fabrication Specialties, Inc.

Technical Information

Bill Gregg, *Promat, Inc.*

Education and Training

R. Dean Burows, *DKB, Inc.*

Union Contractors

John Lambertson,
Irex Contracting Group

Health and Safety

Mike Hill, *Performance Contracting, Inc.*

Young Professional Advisory

Collin Smith, *Owens Corning*

Membership

Rick Sutphin, *Performance Contracting, Inc.*

EVP/CEO Message, continued

In addition to the Education Center's on-demand courses, check out the next few certification-level virtual courses. Turn to page 14 and see how you can become a Certified Inspector and/or Appraiser by mid-2024!

Also included in this issue is an update from NIA Legal Counsel Gary Auman on page 17 with the latest news from OSHA and the DOL. Continuing with the acronyms, how's your EQ? Turn to page 21 to learn more about the four components of emotional intelligence.

Thank you for being part of NIA for another year—we truly are **Better Together!**



Michele M. Jones

Executive Vice President/Chief Executive Officer

WELCOME NEW MEMBERS!

The NIA world is expanding! In this issue, we are excited to welcome the following new companies. We encourage you to read the information each company has submitted and see if they are a potential new business partner for your company.



November 2023

International Affiliate

Enerpaper Srl

Attn: Giandomenico Re

Corso Castelfidardo 30/A

Torino, 10129 Italy

Phone: +39 348 2360114

www.enerpaper.com

Specialties: Building Envelope, Fabrication

About Enerpaper Srl

Enerpaper Srl is an International Affiliate in Torino, Italy. We manufacture building envelope and fabrication products throughout Italy. Enerpaper specifically produces insulation materials for blowing installations through an innovative process based on paper rolls to be flaked during installation. Besides logistical advantages (e.g., lower volumes to be installed and transported), Enerpaper's process provides high thermal insulation performance. Within the next couple of years, we hope to expand into the United States.

Why did you join NIA?

Enerpaper recently joined NIA because we are planning to join the U.S. market and this association is the most important in the field. NIA provides the right market knowledge we were looking for, within the best business network possible.

continued on next page

ST CLAIR EH&S

December 2023

Consultant

St. Clair EH&S Inc.

Attn: Brent Desrochers

33 D'Andrea Trail

Sarnia, ON N7S 6H5

Canada

Phone: (519) 328-5654

Products: Manufacturers Representative

About St. Clair EH&S Inc.

St. Clair EH&S Inc. is a consulting company with our main office located in Sarnia, Ontario, Canada. We provide environmental health and safety services with a focus on managing designated substance compliance programs (i.e., asbestos, lead, etc.) and various other inspection programs (i.e., infrared thermography, insulation, fireproofing, coatings) in the industrial and commercial sectors. We provide various services such as bulk and air sample collection, laboratory interpretation, and assist clients with governmental compliance and project management. In conjunction with our infrared thermography inspection program (i.e., steam line/boiler, energy conservation, buildings/roofing systems, and mechanical/rotating components, etc.), we utilize the 3E Plus® software to help customers recognize the value of utilizing mechanical insulation for energy conservation and environmental preservation. After completion, all inspections and surveys are uploaded to a web-based database, which can be accessed by clients in the field with their mobile device. Whether you require inspection services or more complex program management we are committed to helping our customers achieve their goals in a safe and timely manner.

Why did you join NIA?

Our company joined NIA because we recognize the value of the NIA and the industry-leading professional training programs they offer to the insulation industry. As our company continues to expand our services and grow within the insulation industry, we also look forward to the networking opportunities NIA has to offer to grow our business.

Science. Applied to Life.™

January 2024

Associate Manufacturer

3M

Attn: Molly Kennedy

3M Center, 220-5E-06

St. Paul, MN 55144

Phone: (866) 513-4026

www.3M.com/construction

Products: Adhesives, Fastening Systems, Firestopping (through Penetrations), Jacketing & Flexible Facings, Metal Building Insulation, Sealants, Tapes

About 3M

3M Building Protection provides solutions for air barrier, fire barrier, and insulation moisture barrier that helps contractors save time and labor costs to face even the biggest and most complex challenges head-on. Our VentureClad™ jacketing series and Venture Tape™ series are easy to install, durable, long-lasting, offer zero-permeability, and allow year-round application.

Why did you join NIA?

NIA is a leader in the construction industry for all things insulation. With our membership, 3M is looking forward to building relationships with other members and providing resources that enable us to grow with our partners together.

Rolan®

January 2024

International Affiliate

Aislantes Minerales, S.A. de C.V.

Attn: Arturo Echeverria

Descartes No. 104

Nueva Anzures 11590

Mexico City, Mexico

Phone: 52-55-1036-0640

www.rolan.com



January 2024

International Affiliate

Dongin Engineering Co. Ltd.

Attn: Sang-ki Kim

52, Gangdongsandan-Ro

Gangdong-myeon, Gyeongju-si

Gyeongsangbuk-do 38033

Korea

Phone: +85-54-774-4880

www.dongineng.com

About Dongin Engineering Co. Ltd.

Dongin Engineering, with over 30 years of experience in insulation construction for nuclear power plants in South Korea, stands out as a leading expert in the field. Notably, power plants undergo periodic maintenance activities, which involve extensive insulation removal, disposal, and reinstallation. To address the recurring insulation-related issues arising during these maintenance processes, Dongin Engineering has developed a product known as RAPID (Reusable Advanced Plant Insulation Device), a reusable metal-clad insulation solution.



January 2024

Contractor

G&M Insulation, LLC

Attn: Pete Engen

967 W. Ave. N.

West Salem, WI 54669-1016

Phone: (608) 786-1222

www.gandmininsulation.com

Specialties: HVAC Insulation,
Plumbing Insulation

About G&M Insulation, LLC

G&M Insulation, LLC of West Salem, Wisconsin, is a full-service mechanical insulation contractor for commercial, industrial, and institutional construction projects since 2008. We specialize in HVAC insulation and plumbing insulation.

Why did you join NIA?

We were looking over our affiliations and wanted to make sure we were part of the national association.

LARCH INDUSTRY

January 2024

Contractor

Larch Industry

Attn: Jason Ackerley

770 N. 2nd St.

Berthoud, CO 80513

Phone: (970) 578-0051

\$3–6 Million

www.larchindustry.com

Specialties: Commercial Insulation,
Heat Tracing, HVAC Insulation, Industrial
Insulation, Removable Insulation, Scaffolding

About Larch Industry

Larch Industry is a contracting company out of Berthoud, Colorado, with more than 50 years' experience in industrial insulation. We are an industrial manufacturing insulation company that specializes in projects for food and beverage, oil and gas, ethanol plants, chemical processing plants, and other manufacturing facilities.

Why did you join NIA?

Larch Industry made the decision to join NIA and we couldn't be happier. The resources we have access to have helped us make more informed decisions while building our business. The customer service with NIA is top tier and their team has been more than helpful when navigating the Education Center. We highly recommend anyone in the insulation industry to be a part of NIA.



January 2024

International Affiliate

Tupreco S.A.

Attn: Jose Cespedes Rojas
de Rex Internacional
225 mts ests, Bodega
Heredia, 40703

Costa Rica

Phone: 506-22395627

www.tupreco.net

Specialties: Fabrication

About Tupreco

Tupreco has been leader in the production of pre-insulated pipes for hot and/or cold fluids for more than 15 years. We produce with raw materials that comply with quality standards. With extensive experience in polyurethane foam and thermal insulation, we have worked in a variety of sectors, including chilled water systems, air conditioning, industrial processes, and hot water. Our technical knowledge includes the adoption of international standards such as ISO, ASTM, and ASHRAE.



Why did you join NIA?

Tupreco joined the prestigious institution of NIA to participate in the key developments of the insulation industry. We have excelled at the local level, and through NIA, we will belong to a group of well-respected manufacturers, allowing us to fully participate and give our clients the latest technology while always improving.



MACARTHUR Co.
Building Materials • Employee Owned
Ownership • Trust • Service • Safety • Integrity

February 2024

Distributor

MacArthur Co.

Attn: John Donnelly
2400 Wycliff St.
St. Paul, MN 55114-1220
Phone: (651) 646-2773
\$50+ Million

www.macarthurco.com

Specialties: Acoustic Products/Services, Building Envelope, Commercial Insulation, Distribution, Fire Proofing, Firestopping, HVAC Insulation, Industrial Insulation, Plumbing Insulation

About MacArthur Co.

MacArthur Co. has been around for 110 years! We began selling insulation and a few other products in 1913. In 2005, MacArthur was purchased by the employees and has operated as an ESOP ever since. Today we have 65 branches, of which nearly 40 wholesale distribute an array of performance insulation products, as well as roofing and HVAC. We specialize in fiber glass, elastomeric, mineral wool, tapes, cladding, fire proofing, extruded, high temperature, and more.

Why did you join NIA?

We were excited to join NIA after having been involved in MICA and WICA for many years—we want to continue to build our brand on a national level.

Do you know of a company that could benefit from becoming a member of NIA?

For more information or to refer a potential member, please call Rianna Gleeson at (703) 464-6422, ext. 113, or email membership@insulation.org.

PEOPLE & PLACES

In the News

Honoring the Life of Raymond U. Wopperer, NIA Past President



It is with sadness and gratitude for his industry and association contributions that we share Raymond U. Wopperer of Williamsville, New York, passed away on February 1, 2024, at the age of 100. Raymond served as NIA's 26th President from 1986 to 1987. He joined

his family's business, Frontier Insulation Contractors, Inc., in 1954 and was named President of the company, a position formerly held by his father, Frank C. Wopperer. He used his engineering and business expertise to greatly expand the company. He was also active in teaching and wrote and published a manual on the *Principles of Heat Transfer* during the 50-year anniversary of Frontier Insulation. In 1975, he received the NIA President's Award in recognition of his outstanding achievements.

Raymond will be honored by NIA during the Annual Convention in Naples, Florida.

Armacell Announces CEO Transitions

Armacell recently announced that, after nearly 12 years as President and CEO, Patrick Mathieu has decided to step down at the end of March 2024. Going forward, he will be appointed as a Non-Executive Director by the Supervisory Board.

Effective April 2024, Laurent Musy will join Armacell as President and CEO. Laurent brings a broad range of experience in the global building materials industry. Since 2015, he was CEO of the Terreal Group, a global manufacturer of clay building products and

photovoltaic solutions, after spending 17 years in the aluminum industry, serving a wide range of customer segments across four continents.

"With Patrick as Non-Executive Director, we will continue to benefit from his experience, and with Laurent Musy, as new CEO, Armacell will further accelerate its growth journey," said Mathieu Paillat, Chairman of Armacell's Supervisory Board.

Kristin V. DiDomenico Celebrates 20 Years with NIA Staff



NIA Vice President Kristin V. DiDomenico recently celebrated her 20th anniversary as a member of the NIA team. Kristin joined NIA's Membership and Publications departments in January 2004 and was promoted to Vice President in 2010. Kristin not only oversees NIA operations and membership engagement and recruitment, but also supports the office of the EVP/CEO, several standing committees, the Executive Committee, and Board of Directors as well as working as one of the Program Managers for the Foundation for Mechanical Insulation Education, Training, and Industry Advancement. "Kristin has become part of the fabric of NIA. Her enthusiasm for this industry and her dedication to our association are unparalleled. With Kristin's assistance, NIA has grown tremendously into the organization it is today. Having Kristin's expertise also allowed us to build and launch the Foundation as a 501(c)(3) organization. We are fortunate to have Kristin as part of this team," noted Michele M. Jones, NIA EVP/CEO.



NIA WANTS TO PROMOTE YOUR ACCOMPLISHMENTS!

Share your good news, milestones, article and column ideas, new products, and industry photos with NIA by emailing editor@insulation.org.

We love to highlight NIA member companies and your achievements in *NIA News* and *Insulation Outlook*, through articles and columns such as *Contractors' Corner*, *Celebrating Members*, *Product Focus*, *People & Places*, and more!

Plus, for Contractors, remember to enter your best project photos in NIA's Insulation Project Art Gallery Showcase and Competition by September 28. More details are here: www.insulation.org/niaprojectartgallery.

NIA | 68th Annual Convention Naples, Florida

We Are Better Together: Join Your Peers at NIA's Annual Convention and Silent Auction

April 17–19, 2024

**Naples Grande
Beach Resort
Naples, Florida**

Key Dates and Deadlines

March 15, 2024: Early-Bird,
Hotel Reservation, and Golf
Tournament Deadlines

March 25, 2024: Silent
Auction Donation Deadline

April 1, 2024: Regular
Registration Closes

Throughout her term as NIA President, Laura Dover has emphasized that we, as an industry and an association, are **Better Together**. In her first Industry Message in *Insulation Outlook* magazine, Laura wrote, “To elevate and raise awareness of the value of our industry, mechanical insulation professionals—contractors (large and small, merit and union), as well as suppliers, distributors, fabricators, and manufacturers—can accomplish much more when we come together.” The next opportunity to come together with your national network is NIA’s premier industry event: the 68th Annual Convention and Silent Auction, April 17–19, in Naples, Florida.

Over the course of 3 days, attendees will connect through ample networking opportunities and educational sessions uniquely targeted for the mechanical insulation industry, while enjoying the sunshine and warmth of Naples. “Personally, what I look forward to each year at NIA’s Convention is seeing industry friends and clients I don’t get to see very often, as well as meeting so many new folks. When our Convention Planning Committee set out planning this year’s Convention, we made sure there will be lots of time to enjoy the warm and sunny beach location, and time to connect with each other. Plus, I think people are really going to enjoy our Keynote Speaker Kyle Scheele—I’m positive he will open all of us up to new ideas,” said NIA President-Elect Jack Bittner, who chairs the Convention Planning Committee.



LEARN FROM YOUR COLLEAGUES AND INDUSTRY LEADERS

Sustainability Panel Discussion: Insulation's Impact on Energy Efficiency and Emission Reductions

Sustainability has been a popular buzzword over the last few years, but how is this movement impacting the mechanical insulation industry? Attendees will hear from panelists on how their companies define sustainability, how it impacts their customers and vendors, and how the industry can work together to gain recognition for mechanical insulation's role in ESG/decarbonization initiatives.

Panelists:



Dean Burows

President,
DKB, Inc.



Jordan Fiske

Industrial Operations
Assistant Manager,
Anchor Insulation



Scott Sinclair

National Specification
Manager, Industrial
Insulation, Johns Manville



Heather Teasley

Vice President of Digital
and Marketing, Specialty
Products & Insulation

The Amazing Race—Competing for Energy Efficiency and Emission Reduction Recognition in a Crowded Space, a Foundation Town Hall Discussion

With a global focus on carbon emissions, energy efficiency, and sustainability, every industry is competing for recognition of their efforts and contributions to these initiatives. The mechanical insulation industry is no different in its commitment to a more energy-efficient world, and our story and capabilities in this space are unquestionable.

Working diligently behind the scenes to support these efforts is your industry's Foundation for Mechanical Insulation, Education, Training, and Industry Advancement. Its work to develop and implement strategies to advance and expand the industry is impressive. But how much do you know about the Foundation's work? Can you name a recent initiative the Foundation has supported? How does this work impact the industry and our specifier, engineer, plant owner, and facility manager audiences as well as your company directly? Join members of the Foundation's Board of Directors and staff for an informative discussion about its industry advancement initiatives, its priorities for the coming years, and learn why the Foundation is so important to the future of our industry. This is an open-format panel discussion where we want your input and involvement.

Panelists:



David J. Cox
Owens Corning
– Foundation
President



John Lamberton
Irex Contracting
Group – Foundation
Treasurer



Marc Napolitano,
Insulation Materials
Corporation – Foundation
Secretary



Dean Burows
DKB, Inc. – Foundation
At-Large Board
Member

NIA's Business Session

All active NIA members—contractors, distributors, fabricators, and laminators—should plan to attend NIA's Business Session on the morning of Thursday, April 18, where they will vote on the new members of the Board of Directors.



View details about educational sessions and the schedule at www.insulation.org/convention2024.



National Networking Each Day

Take a few minutes to review each day's planned networking events so that you can maximize your networking time and schedule your own meetings.

TUESDAY, APRIL 16

5:30–6:00 p.m.	First-Timers Happy Hour (First-time attendees will receive an invitation to this event)
6:00–7:00 p.m.	Cocktail Reception

WEDNESDAY, APRIL 17

7:30–8:30 a.m.	Networking Breakfast
1:30–6:00 p.m.	Open Time for Networking
6:00–9:00 p.m.	Welcome and Appreciation Dinner: White Linen Party

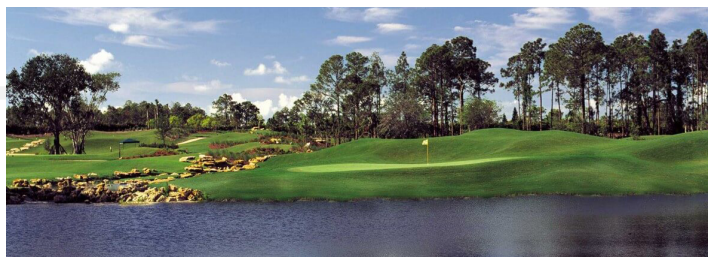
THURSDAY, APRIL 18

7:30–8:00 a.m.	Networking Breakfast
1:00–5:30 p.m.	NIA's Golf Tournament (Separate registration required)
1:00–5:30 p.m.	Open Time for Networking
Evening	Open Time—Enjoy Naples!

FRIDAY, APRIL 19

8:00–10:30 a.m.	Networking Breakfast and General Session
12:30–5:00 p.m.	Open Time for Networking
6:30–8:00 p.m.	Farewell Reception and Dinner
8:15–9:00 p.m.	Silent Auction
8:00–10:00 p.m.	Hosted Dessert Hospitality Suites

Note: Schedule is subject to change. Check www.insulation.org/convention2024/schedule for the most up-to-date information.



GIVING BACK AT NIA'S SILENT AUCTION

On Friday evening, NIA's 6th Silent Auction will feature friendly—and highly competitive—bidding to benefit two nonprofit organizations, **Sunshine Kids** and the **Foundation for Mechanical Insulation Education, Training, and Industry Advancement**. A few of the donations so far include vacation packages, Tiffany and Co. bracelet, Tory Burch bag, PXG gift card, sapphire and diamond bracelet, and MUCH more to come!

The 2024 Silent Auction Task Force is actively seeking donations, and the deadline to donate items is March 25. Items that have historically done very well are jewelry, purses, trips that offer a lot of flexibility, fine wine and spirits, and military-related items. If you would like to make a donation, please contact events@insulation.org.

NAPLES GRANDE BEACH RESORT

NIA's discounted room block will sell out—make your reservation and lock in NIA's discounted rate of \$269 per night, plus taxes. The hotel service fee has been waived (normally \$40 per room, per night). These rooms are available on a first-come, first-served basis. All guest rooms feature a view of the water and a large balcony.

With a wide variety of recreational activities and relaxation locations, there is something for everyone! Sunbathe on the white sand beaches along the Gulf of Mexico, make a splash in one of three resort-style pools, indulge in six unique dining options, hit the links at the private Rees Jones-designed golf course, or treat yourself at the luxurious Spa at Naples Grande Resort. There is so much to do at this resort!

Visit www.insulation.org/convention2024/location/hotel-reservations for details.

THANK YOU SPONSORS!



DID YOU KNOW? TIPS & RESOURCES FOR FIRST-TIME ATTENDEES

For new members, first-time attendees, or anyone wanting to get the most out of NIA's 68th Annual Convention, we have some helpful advice and insider tips for you. As a first timer or new member, know that you are not alone! **On average, 15% of Convention attendees are first timers or new members.**

If you do not find an answer to your questions here, email Ashley Bartley at events@insulation.org.

- Consider bringing your spouse, guest, or significant other—normally, about 40% of attendees bring someone along. If your spouse or guest would like to receive Convention attendee emails specifically for guests, please share the guest's email address by sending it to events@insulation.org.
- Plan to arrive by Tuesday, April 16—join us at the Cocktail Reception before sessions start on Wednesday.
- Pack business casual and resort attire. Comfortable shoes are recommended, as well as jackets and sweaters for possible outdoor events. Bring flip flops and something white to wear for our Wednesday evening beach event.
- Bring plenty of business cards and carry them with you—networking is a key component of NIA's Convention. You can also connect with new members through the Convention app.
- Make contact with a Membership Committee member when they reach out to you, and learn about the Annual Convention through our Ambassador Program.
- Look for an attendee email from NIA about a week before the Convention—it has last-minute details that will help you be better prepared for the Convention.

TIPS FROM MATT CALDWELL

NIA Board of Directors, SEICA Representative, Membership Committee Member, Caldwell Insulation, Inc., Powder Springs, Georgia

Relationships—Nothing has been more valuable to me personally than the personal relationships I have been able to make through my NIA participation. Having an ally who lives the same life as I do and walks the same path as I do has proven helpful in many situations over the years.

Exposure & Participation—Actively working in this association shows others my support of the industry that provides our living and that of my family. Don't just take from it, give to it. It is such a rewarding process to give back to this great industry.

The People—What can I say...This is an industry that is made up of GREAT people. You don't really recognize the level of professionalism and knowledge that the participants in NIA bring to the table until you come out and meet them. Wow, we have great members. I am truly honored to work and learn alongside these men and women. There is never a meeting that I don't go back home being proud of my occupation.

For more tips, visit <https://tinyurl.com/4rjythn2>.



NIA's Education Center:

What Can it Do for You and Your Team

NIA's Education Center is the go-to training and education resource for the insulation industry and was developed to deliver easily accessible, on-demand, targeted training from a trusted industry source. With the help of our subject matter experts, NIA develops 20 to 30 new courses each year, so there is always something new being added to NIA's Education Center.

Distribution International's (DI's) Senior Director of Sales John Brooks noted, "NIA's Education Center will allow DI to quickly deploy beginner, intermediate, and advanced training to all members of our team by having a one-stop shop with self-serve educational opportunities. From onboarding to introducing new training concepts, to having a place for our team to go when learning needs are identified, to helping team members with their career aspirations, this training tool will help us better serve our customers. For our industry, it is another important means of spreading the word about the benefits and potential applications of mechanical insulation."

Education Center Resources: Learn More about Learning Opportunities!

- Visit our FAQ web page at www.insulation.org/educationcenterfaqs.
- Visit our NIA Education Center Information web page: www.insulation.org/training-tools/niaeducationcenter (there is a 4-minute video demo, too).
- Visit www.niaeducationcenter.org.
- Email training@insulation.org or call (703) 464-6422 and ask for Ashley Bartley (ext. 118) or Erin Penberthy (ext. 114).

In addition to insulation-specific content, modules cover General Business, Health and Safety, Human Resources, and Energy Savings. Whether you have 5 minutes or a few hours, there is something new to learn in NIA's Education Center.

What Are the Newest Courses to Explore?

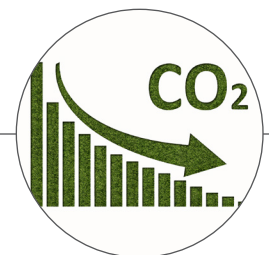
- Construction Safety Orientation
- Culture of Early Reporting
- Hazard Communication for Construction: How to Use Labels and Safety Data Sheets
- How to Do a LinkedIn Post
- Insulation Product Categories
- Mental Health Resources for the Construction Industry (presented in collaboration with the resources of The Center for Construction Research and Training)
- Understanding the Decision Process for Specification Development

Courses Coming Soon

- Benefits of NIA Membership
- Defining a Mechanical Insulation Contractor
- Mechanical Insulation Basics (Spanish)
- Mitigating Corrosion under Insulation (CUI)

Premier Training Subscribers

When your company becomes a Premier Training Subscriber, it allows everyone on your team access to subscriber content for the full year until December 31.



Coming Soon: Mechanical Insulation Basics in Spanish

These self-paced, on-demand, e-learning modules are now offered with a Spanish voiceover and designed for your team members who are new to the industry. The series explains the types of insulation on the market, the science and technology of how insulation works, design questions that should be asked for every project, and basic insulation information to help beginners become knowledgeable about the industry. This is included as part of the Premier Training Subscription package. The series includes five modules.

- **Module 1:** Educational Series Introduction and Defining Mechanical Insulation—Explores mechanical insulation in comparison to other insulation market segments and demonstrates calculators available within the Mechanical Insulation Design Guide.
- **Module 2:** Benefits of Mechanical Insulation—Provides a general overview of the power of mechanical insulation in the new construction, renovation, and maintenance arenas when designed, installed, and maintained properly.
- **Module 3:** Mechanical Insulation Science & Technology—Dives into the principles of understanding energy, what insulation is, how insulation works, psychrometrics, and mechanical insulation definitions and terminology.
- **Module 4:** Mechanical Insulation Design Objectives and Considerations—On some projects, multiple design objectives and considerations must be satisfied simultaneously, and this module explores objectives and considerations.
- **Module 5:** Mechanical Insulation Maintenance—Shares the benefits of timely and proper maintenance for a significant return on investment.

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* This list is up to date as of February 29, 2024.

Interested in a custom package or in learning more about sponsorship? Erin Penberthy can help you match your needs to NIA's resources. Email training@insulation.org or call (703) 464-6422, ext. 114.

NIA's Certification-Level Courses

In the next few months, NIA has several virtual course options for certifications for the insulation industry: the Thermal Insulation Inspector Certification™ and the Insulation Energy Appraisal Program™. Plus, for anyone newer to the industry, NIA offers the option to take only Understanding Mechanical Insulation, which is covered in the first 2 days of the full 4-day Thermal Insulation Inspector Certification course. As always, NIA members receive significant registration discounts.

NIA is starting to see Certified Inspector requirements in specifications for projects. We recommend getting someone from your team certified as soon as possible to ensure your business is ready to bid on new projects as they arise.

For learning objectives, prequalification details, and course benefits based on your business type, visit www.insulation.org/training-tools.

June 2024

NIA | Understanding MECHANICAL INSULATION

Understanding Mechanical Insulation

Course Dates: June 4–5 (virtual)

Registration Deadline: May 20

Training Level: Intermediate

Member Registration Fee: \$1,665

This course is excellent training for new employees to gain an overview of the mechanical insulation industry and products, focusing on a review of industry market segments; the need for and importance of inspection; the purpose of mechanical insulation systems and why that is important to the inspection process; primary insulation materials and protective coverings; the importance of Safety Data Sheets; and codes, standards, regulations, and guidelines, and how they are intertwined.

June 2024



Thermal Insulation Inspector Certification™

Course Dates: June 4–5 and June 11–12 (virtual course)

Registration Deadline: May 20

Training Level: Advanced/Certification Level

Member Registration Fee: \$2,805

This certification-level course is designed for experienced insulation professionals ready to learn a new specialty, and for companies ready to add insulation system inspection as part of their services. Who should take this course? Anyone who has responsibility for contracts, maintenance, business development, quality assurance/quality control, project oversight, safety, inspections, estimating, management, product development, mechanical insulation system design, and specification development.

November 2024



Insulation Energy Appraisal Program™

Training Level: Advanced/Certification Level

Course Dates: November 12–13 (virtual)

Registration Deadline: October 24

Training Level: Advanced/Certification Level

Member Registration Fee: \$1,555

This certification-level course teaches students how to determine the optimal insulation thickness and corresponding energy and dollar savings for a project. Learn how to conduct a facility walkthrough, use the 3E Plus® software, utilize infrared cameras during inspections, understand steam efficiencies, analyze and complete an appraisal spreadsheet, and present your customer with a final report that outlines the potential savings and emission reductions mechanical insulation can provide.

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You can host any of NIA's courses for your employees, members, or clients. Hosted courses are a cost-effective way to bring industry training to your team and guests, providing an avenue for your company's end-user and engineer clients to learn more about the value of appraisals and inspections. Each course can be presented in person at your location or hosted virtually, and they can be held anywhere within the United States or Canada. NIA staff members will ensure you receive your member discounts. Contact NIA at training@insulation.org for pricing and more information.

For more information or answers to questions about hosting a course for your company, please visit www.insulation.org/training-tools or email training@insulation.org.



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WITH ONE AD!

Insights from NIA's Young Professional Advisory Committee (YPAC) Mentor Program

NIA's unique mentoring program continues, recently pairing NIA Board of Directors member Rick Sutphin of Performance Contracting, Inc. (PCI) with YPAC member Ashley Luse DeBoer of Luse Contracting Group.

The two had virtual one-on-one sessions and then shared highlights of their conversations with the YPAC audience during NIA's Fall Summit in November 2023.

UNLOCKING SUSTAINABLE STRATEGIC PLANNING: Insights and Best Practices from an NIA Mentorship Pairing

By Ashley Luse DeBoer

I had the privilege of participating in NIA's YPAC Mentor Program, being paired with Rick Sutphin to explore the topic of strategic planning and deliver a presentation to the YPAC members at the 2023 Fall Summit.

Introduction

We began by highlighting the essential alignment between strategic planning, goal setting, and adherence to core values. Rick defined strategic planning as designing a trajectory for where a company wants to go in 1, 3, and 5 years and beyond, and then setting the processes in place for getting there. The YPAC members revealed varying degrees of awareness and involvement of next-gen leaders in their companies' strategic planning processes, which highlights the importance of understanding and engagement with a company's strategic plan at all levels within an organization.

The Importance of a Sustainable Process

An effective strategic plan starts with setting a crystal-clear vision that aligns with market dynamics and services, thereby defining the company's desired direction. Once the vision is set, it is critical to create a structured process with built-in accountability channels. Rick emphasized the importance of routine strategic planning sessions and meticulous agendas to address all crucial aspects.

Rick walked through PCI's methodical approach to planning, commencing in January with a weeklong leadership group offsite, followed by branch-level strategic planning meetings where annual goals are set, and culminating in upward board presentations and downward cascading information to managers and employees. I was impressed to learn that PCI's leadership group goes on their annual

strategic planning getaway the same week every year, and Rick inspired me to take my own team's annual strategic planning meeting outside the office this year.

At Luse, we follow a strategic planning process inspired by the book *Traction*, by Gino Wickman, and the Entrepreneurial Operating System (EOS). We set annual and quarterly goals, and our managers each commit to a set of "Quarterly Rocks," which are the items that must happen to keep our organization on track for that quarter.

Lessons Learned and Audience Interaction

Sharing insights gleaned from Rick's mentorship, I stressed the need for an earlier start to Luse's annual planning process, leveraging real-time data through dashboards for informed decision-making, and the instrumental role of an Internal Audit Committee to evaluate our processes. At Luse, we already lean on our Board of Advisors to hold management accountable to our strategic plan, but I came away from my conversations with Rick with ideas for how to engage our Board even further.

Audience engagement and discussions on processes further enriched our YPAC session, shedding light on the practical applications within our various organizations.

Culture, Core Values, and Strategy

The enduring quote, "culture eats strategy for breakfast," resonated with the group, emphasizing the fact that a great strategic plan can be either bolstered or derailed by an organization's culture.

Rick emphasized the critical need for a company's strategy to be aligned with its core values, underscoring the foundational role of a leadership team to be involved not only in guiding strategic

initiatives but also with the core values. He spoke about the fusion of culture and strategy, highlighting the importance of a top-down approach in embedding values into a company's ethos.

Expanding on this, I outlined Luse's cultural initiatives, highlighting our integration of strategic planning with our company's four Cultural Cornerstones. The holistic approach embraced by Luse, from hiring and culture onboarding to annual culture surveys and manager reviews, illustrates another contractor's ambition to fuse strategy with a vibrant organizational culture.

Additional Resources

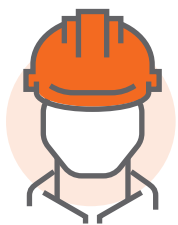
We wrapped up the session by providing a list of recommended resources for a deeper study of strategic planning. Our book recommendations included the aforementioned *Traction* by Gino Wickman and *Turning the Flywheel* by Jim Collins,

complemented by practical tools such as the EOS Model (see www.eosworldwide.com), which provides a toolkit for businesses needing a more structured strategic planning process.

I feel extremely grateful to have received Rick's mentorship this past year. (Thank you, Rick!) I hope this brief glimpse into our discussions provides more NIA members with a few nuggets of wisdom when it comes to strategic planning.



Ashley Luse DeBoer is the President of Luse Contracting Group, a fifth-generation, family-owned mechanical insulation contractor with offices in Chicago, Illinois, and Milwaukee, Wisconsin. Ashley is a past Chair of NIA's YPAC. Learn more about participation in YPAC, including the YPAC Mentor Program, at www.insulation.org/membership/ypac.



Safety Corner

OSHA and DOL Update

By Gary Auman

The following provides a brief OSHA update, as well as some information regarding a new rule by the Department of Labor (DOL) concerning independent contractors that may affect your relationship with either individuals or companies your company uses as contractors.

On the OSHA front, penalties have increased for 2024. The maximum penalty for a serious OSHA violation has gone from \$15,625 to \$16,131. The penalty for a willful or repeat OSHA violation has increased from \$156,259 to \$161,323.

OSHA also has released the top violations for 2023. Here are the 10 most frequently cited standards for the fiscal year: Leading off the group is fall protection in construction, then hazard communication in general industry, ladder safety in construction, scaffolding in construction, powered industrial trucks in general industry, lockout/tagout in general industry, respiratory protection in general industry, fall protection training in construction, eye and face protection in construction, and machinery/machine guarding in general industry.

On December 11, 2023, OSHA announced that it was switching from traditional hard hats to safety helmets to better protect its agency employees from head injuries. OSHA recommends safety helmets be used by people working in the construction industry, in the oil and gas industry, in high-temperature specialized work, while performing tasks involving electrical work, and while working from heights. While OSHA has not yet modified or issued a standard requiring helmets instead of hard hats, I believe this is something we can expect in the not-too-distant future.

On January 9, 2024, the DOL unveiled its final Independent Contractor Rule. This rule goes into effect on March 11, 2024. The rule will affect NIA members in terms of how they deal with independent contractors (I/Cs) and how I/Cs with whom they do business are viewed by different government agencies. Of course, my concern is safety for all employees, but sometimes rule changes may catch even the most diligent contractor/employer unawares. So, from an enforcement perspective, you need to be aware of rule changes that alter the "playing field" as to your responsibility for



individuals working on your jobsites. Will the new rule cause OSHA to look at I/Cs you hire to work for you as true I/Cs, who are paid under a contract (and/or with a 1099), or as your employees? Hiring individuals and paying them with a 1099 will no longer be sufficient to make them considered I/Cs. With the new rule, the DOL has gone from considering control of contractors in how they accomplish the task for which they were hired to consideration of six different points to determine their status. We have been told that all six points will be considered, and their combined weight will result in a determination of contractor status. But I believe it is also apparent that if, in one of the points, your actions and the actions of your contractor clearly indicate that you are controlling every aspect of what that contractor does, any decision by OSHA or another agency will be that the contractor is indeed an employee of yours.

The first point to be considered is your ability to show that the contractor with whom you are doing business has the opportunity for profit or loss depending on their managerial skill. The DOL has provided examples of each of the six points, as well as an indication of what will be considered. For this point, the consideration is whether a worker hired as an I/C is truly an I/C or an employee. The example given is that if the worker produces their own advertising, negotiates their own contracts, decides which jobs they wish to perform and when they will perform them, and decides when and whether to hire helpers to assist with the work, they are exercising the type of managerial skill that affects their opportunity for profit or loss. If, however, the worker performs assignments only for your company, does not independently choose his/her assignments or solicit work from other companies or clients, and does not advertise their services or take any action to reduce their costs, they will be seen more as an employee than an I/C. Space does not permit me to provide examples for all the remaining points, but this first point gives you an idea of what additional information is available from the DOL.

The second point is a consideration of investments made by the worker or small unincorporated contractor who is going to work for

you using their own business. If they bring their own tools, travel in their own vehicles, provide their own safety equipment, etc., they are more likely to be considered an I/C than your employee.

The third point is the degree of permanence of the contractor's working relationship with you. Again, if they only work for you and do not accept or solicit work from others, they more likely will be considered an employee than an I/C.

For the fourth point, consideration will be given to the nature and degree of control you have over their work. If you control many of the aspects of the work performed for you, the individual or unincorporated "contractor" is more likely to be considered your employee.

The last two points are fairly self-explanatory: the extent to which the work performed by the contractor is an integral part of your business, and the amount of skill and initiative required to perform the work.

As I have indicated, the agency evaluating the status of contractors you hire to support your business will consider the above six aspects of the working relationship you have with them, in combination or separately, if one clearly defines a relationship as that of employer-employee. As a result of this new rule, it is essential to have a written contract with any individual or company you wish to have perform services for your company, and the contract you have should clearly set out your relationship with that individual or company if you hope to retain a contractor-I/C relationship.



GARY AUMAN (www.amfd Dayton.com) is a Partner in the law firm of Auman, Mahan, and Furry in Dayton, Ohio. His practice focuses on counseling and defending employers in safety and health matters. He frequently works with employers and OSHA to find workable solutions to OSHA enforcement actions. He represents four national and

regional trade associations in the construction industry and can be reached at gwa@amfd Dayton.com.

From the Foundation Board of Directors

Update on the Foundation for Mechanical Insulation Education, Training, and Industry Advancement



Mechanical Insulation
EDUCATION TRAINING ADVANCEMENT

In the first quarter of 2024, the Foundation for Mechanical Insulation Education, Training, and Industry Advancement (Foundation) Board of Directors hit the ground running, laying out plans for impressive initiatives and ways to promote the Foundation's important work.

Getting to Know the Mechanical Insulation Industry's Foundation

Did you know that the Foundation:

- Was originally established in 1997 as a committee under NIA and recently spun off into an independent 501(c)(3) organization?
- Boasts decades of support and resource development for the mechanical insulation industry, including the Insulation Energy Appraisal Program™, the biennial Industry Measurement Survey, the Mechanical Insulation Design Guide, numerous contributions to research and data development, and the content included in NIA's Education Center?
- Is funded by voluntary, annual contributions?
- Recently established the Legacy Circle Endowment Fund?

There is so much to learn about this organization! As such, the Foundation Board of Directors will be leading a panel discussion during the 2024 NIA Annual Convention. It will be an opportunity to ask your burning questions and gain insight into the Foundation's inner workings, leadership roles, structure, strategic initiatives, and recent development of the Legacy Circle Endowment Fund. You will leave with an understanding of why the Foundation is vital to the industry and why you and your company should get involved. Please note that 2024 NIA Annual Convention registration is required to attend the panel discussion.

Date: Thursday, April 18

Time: 8:00–11:00 a.m. (during the Welcome and General Session)

Location: Naples Grande Beach Resort, Naples, Florida

Welcome New Contributors

The Foundation would like to recognize the generous support of its newest contributors:

- Proto Corporation (Bronze Level, \$1,000)
- WICA Wisconsin Insulation Advancement Fund (Bronze Level, \$1,000)

The Foundation is a tax-exempt 501(c)(3) organization, and annual contributions are tax deductible. Contribution levels include:

Platinum—\$30,000	Gold—\$5,000
Gold Elite—\$15,000	Silver—\$3,000
Gold Plus—\$10,000	Bronze—\$1,000

If you would like to make a 2024 contribution, or learn more about the Foundation and the programs it supports, please contact Kristin V. DiDomenico at foundation@insulation.org.

The Foundation Thanks its Current Contributors

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Western Insulation Contractors Association
WICA Wisconsin Insulation Advancement Fund

More Ways to Contribute

Legacy Circle Endowment Fund

The Foundation and the work it does to advance the industry is currently supported solely by voluntary corporate contributions. Recently, the Board of Directors approved the creation of the Legacy Circle Endowment Fund as a way for those in the industry who want to leave a personal donation to do so, allowing donors to determine if their donation will be for a specific program or put into a general fund. Contributions to the Legacy Circle Endowment Fund are fully tax-deductible donations and will serve as a permanent way to honor those who contribute.



Inaugural donors include:

- The Raymond M. Burows Education Fund (DKB, Inc.)
- Owens Corning Foundation

If you are interested in donating, or want to arrange a donation in honor of an individual, contact us at foundation@insulation.org. In addition, a copy of the donor agreement and fund policy is located at www.insulation.org/foundation/contribute/endowment.

Fall Summit
EDUCATE | ENGAGE | ELEVATE 2024

NIA's Fall Summit

October 28-29, 2024

MGM National Harbor
National Harbor, Maryland
(located just outside of Washington, DC)

How Good Is Your EQ?



By Sara Mosqueda

Successful leaders often have high emotional intelligence (EQ). When combined with other soft skills, such as empathy and self-awareness, such leaders ensure that their employees feel appreciated and valued, making them a more productive team.

EQ is simply the ability to understand and manage your own and others' emotions, and grasp how emotions drive behaviors. However, when it comes to feelings, things are not always so simple. Have you ever lost your temper? Or felt at a loss as to why someone else behaved seemingly irrationally? While a lower EQ can strain personal relationships, it can have even larger repercussions on your career.

"Leaders set the tone for their organization. If they lack emotional intelligence, it could have more far-reaching consequences, resulting in lower employee engagement and a higher turnover rate," according to a post of the Harvard Business School (<http://tinyurl.com/2p823e6f>).

Thankfully, this is a skill that you can improve. And if you already have a high EQ, it cannot hurt to try to increase it or recognize where you could help up-and-coming leaders to improve.

There are four key elements that make up a person's emotional intelligence.

Self-Awareness

This element includes having a clear understanding of your strengths, limitations, emotions, beliefs, and motivations. This is less common than you might assume. A 2015 study (<http://tinyurl.com/nhhw467z>) found that 79% of executives had at least one blind spot—a skill they ranked as one of their strongest while their coworkers said it was a weakness.

Those blind spots can add up to notable business challenges. Team success is cut by 50% when they are made up of significant over-raters—those who believe they are contributing more than what their team members perceive—according to data from the *Harvard Business Review* (<http://tinyurl.com/yc6ar74s>).

Self-Management

This is the ability to manage one's own emotions, regardless of how stressful a situation may be. Although reactions can be automatic or reflexive, there are ways to control your reactions to external factors.

- Pause. Breathe.
- Collect yourself and do what you need to manage your emotions. Vent to a trusted friend or go for a walk (or run).
- Get back to a positive mood—a leader's emotional state is often infectious.
- Remember that practice makes perfect. New habits, like replacing destructive reactions with productive ones, do not happen overnight. Be kind to yourself, and keep putting in the work.

Beyond emotional self-control, other aspects of self-management include adaptability, a positive outlook, and achievement orientation.

Social Awareness

As important as it is to know yourself, it is just as important to know how to take the temperature of a room—this is the ability to understand others' emotions.

Leaders adept in this skill will also practice empathy, which can help them connect with their peers. Empathetic leaders perform more than 40% higher (<http://tinyurl.com/57bwudv4>) than others when it comes to coaching, engaging employees, and making decisions.

Besides empathy, social awareness also involves an awareness of the organization and the politics and relationships between staff.

Relationship Management

This is not just about conflict management. It is also about a leader's ability to coach, influence, and mentor others.

In a survey for the Society of Human Resource Management, 72% of employees said that "respectful treatment" of the entire workforce was a top factor in job satisfaction (<http://tinyurl.com/5fprbfzc>).

An emphasis on teamwork and inspirational leadership are other strengths that support this aspect of EQ.

Sara Mosqueda is an Associate Editor at ASIS International (www.asisonline.org). Founded in 1955, ASIS International is a global community of security practitioners, each of whom has a role in the protection of assets—people, property, and/or information. ©2023 ASIS International, 1625 Prince Street, Alexandria, VA 22314. Reprinted with permission from the November 2023 issue of Security Management magazine.

Convention Tax Deductions

How to Cut the Costs of Travel and Lodging

Attending a convention can mean big bills for travel and hotels. Businesses can deduct those expenses on their tax returns, softening the blow to the bottom line, but deductions must be supported by adequate documentation to be defended in the event of an audit.

By Phillip M. Perry

Conventions provide great opportunities to expand industry knowledge and develop your personal network. However, travel costs, alas, keep going up. Sending several people to an event can result in a serious hit to your bottom line.

Luckily, Uncle Sam allows you to soften the financial blow by deducting your travel expenses on your income tax return for any legitimate event. What qualifies as legitimate? The answer is basically that the event must relate directly to your business.

“As long as you are expecting to generate business from the event, expenses for attending are legitimate deductions,” says Richard R. Rhodes, an enrolled agent with Hinckley Tax Service in Medina, Ohio (hinckleytaxservice.com). “Even if you do not generate revenue directly from the event, you might be anticipating doing business in the future with someone you have networked with.”

Supporting Material

You can take specific steps to establish that your trip is a legitimate one for tax purposes. The Internal Revenue Service (IRS) wants to know the intent behind your travel. Take notes that support the business nature of your trip. Whom did you see? What subjects did you discuss? How did activities during your trip support your operations?

Retain any materials, such as badges or seminar workbooks, that help prove you were actually at the event. Other helpful materials would be conference agendas with business-oriented sessions, a catalog of relevant seminars (mark the ones you attended), business cards, and other related documents.

What to Deduct

Here is an important caveat: The ideas in this article are intended to provide you with initial guidance. You should always confer

with qualified legal and accounting professionals to make sure you deduct expenses properly.

So what are some deductible expenses? Actual transportation costs are the most obvious. They can include travel by airplane, train, bus, or automobile. Taxi or hired car travel during the visit is also deductible. So are baggage costs, tips, and what the IRS calls “ordinary and necessary expenses related to your business travel.” These might include rental fees for computers or other equipment.

The IRS provides extensive guidance on the deduction of expenses in its publication *Travel, Gift and Car Expenses*. Visit www.irs.gov and search for “463.” For a complete list of deductible items in that publication, see Table 1-1 on page 7. Additional information is available in another IRS document entitled *Business Travel Expenses*. Search the same site for “511.”

Restaurant meal deductibility is undergoing an important change. At one time, eligible meals were 100% deductible, but they are no longer. Going forward, employee meals while traveling are only 50% deductible. (Food is fully deductible, though, if it is included as taxable compensation to employees and included on the W-2).

Note that meal costs are not deductible at all if the trade show is close to home. The IRS puts it this way in its publication *Travel, Gift and Car Expenses*: “You can deduct the cost of meals if it is necessary for you to stop for substantial sleep or rest to properly perform your duties while traveling away from home on business.” If your travel requires an overnight stay, then meals are eligible for deduction.

On a related matter, the 2017 Tax Cuts and Jobs Act eliminated the deductibility of entertainment—an expense commonly encountered by businesspeople attending trade shows.

Loss of the entertainment deduction has hit many businesses pretty hard. Some are rethinking how they court clients. How about



your own business? Should you still entertain customers, even though you cannot deduct the bill? You need to look at your return on investment. Does the expense result in more business because it encourages customers to return?

Careful Records

Despite the elimination of the entertainment deduction, there are still many legitimate deductions available to business travelers; and while they certainly soften travel's bottom-line impact, keep in mind that the system only works if you record and retain the requisite backup documentation. "Travel expenses, especially those for meals, are very often low-hanging fruit for auditors," says Rhodes. "That's because many people fail to keep adequate records."

If your paperwork does not support your deductions, they can be taken away. In addition to the increased taxes that will result, there may also be penalties and interest payments.

So how can you track your expenses in a way that will satisfy the authorities? The tried-and-true medium is paper—and many people still keep folders bulging with receipts. But with the arrival of the digital age, things can be a bit easier—at least for anyone comfortable with technology.

"Smart phone apps are especially valuable for keeping receipts of your meals," says David Cawley, Partner and Certified Valuation Analyst at Fraim, Cawley & Company, CPAs, Roanoke, VA (fraimcpa.com). "You can just take pictures of your receipts and store them in a database." Alternatively, you can have vendors email receipts to your smart phone. Then, file the emails in a folder that is easier to access—and back up—than faded paper files. (For computer programs that can help, see the sidebar, "Apps that Track Expenses.")

Apps that Track Expenses

Hate stuffing bags with paper receipts and jot-ting indecipherable notes in journals? Try using these electronic expense trackers that are as close as your smart phone.

- **Travelperk.com** integrates the recording of travel expenses with other expense management software.
- **Fylehq.com** ensures compliance with an employer's travel expense reimbursement policies.
- **mileIQ.com** runs in the background to track mileage and creates an end-of-trip record.

One more thing: Once you have your records in hand, hang onto them. The IRS can go back 3 years when auditing your returns. If they find anything, they can go even further back than that. We recommend keeping documentation for 7 years, which is as far back as the IRS can go."

When it comes to state law, the rules can be more onerous. Montana, for example, can go back 10 years. Find out what the rules are in your own state, because each one is different.



Bonus tip: “Consider charging all of your business expenses on a dedicated credit card,” says Cawley. “Then you’ll have a permanent record of where you went and how much you spent.” And that credit card’s statements will provide an easily accessible journal of your business activities.

Per Diem Rates

Does collecting meal receipts—digital or otherwise—seem like a hassle? Ask your accountant if you are eligible to utilize “per diem” rates—daily cash amounts that are set by the government.

“Each year, the IRS comes out with a per diem rate for each geographic area,” says Cawley. “The rule is that you can either deduct your actual expenses, in terms of meals and incidentals, or just use the per diem rate, based on how many days you are there. You should track both in tandem, then use whichever number is higher. This can be really handy in high per diem cities.”

The per diem option is often overlooked by business travelers. “Many people will deliberately keep their meal expenses low, because they are on a budget,” says Cawley. “But then they forget that they have a right under the IRS code to take the higher per diem rate. As a result, they end up not getting their higher deduction.”

One more thing: Are you planning to use your personal car to travel to the show? If so, you face another decision: whether to use the standard mileage rate or keep track of your actual expenses. The decision will lie in how good a recordkeeper you are and how much hassle you want to put up with. Sometimes the standard deduction is the easier option.

Personal Time

What if you spend some vacation or personal time during your trip? How does that affect the deductibility of your expenses? An excerpt from IRS document 463 provides some clarification: “You can deduct all of your travel expenses if your trip was entirely business-related. If your trip was primarily for business and, while at your business destination, you extended your stay for a vacation, made a personal side trip, or had other personal activities, you can deduct only your business-related travel expenses.”

It is important to keep careful records about your journey, allocating correctly between business and personal time. “My overall tip is to be truthful,” says Catherine Raker, an accountant with Cendrowski Corporate Advisors, Chicago (cca-advisors.com). “If it’s really a personal trip and you do some business-related activities, don’t write the whole trip off as a business expense.”

Expenses that are shared for business and vacation can fall into a grey area, according to Cawley. “Your airline fare might be disallowed if you spend 2 days of your trip on business and 5 days on vacation. On the other hand, your hotel bill for the specific 2 business days, and other direct expenses for the business portion of your trip, would still be deductible.”

Personal time often means the presence of a spouse—and expenses related to that individual’s travel can complicate record-keeping. Ordinarily, such expenses must be separated from those of the business traveler, and may not be deducted. There is one exception: If you are traveling with your spouse who is participating for a genuine business reason in the event, then that individual’s expenses are covered.

Keeping Track

Conventions can be valuable resources for your business. By bringing together everyone in one place, they facilitate the exchange of important information and lead to higher profits. Taking the time to document your activity when you travel can help alleviate the costly impact travel and hotel expenses can have on your bottom line.

“It can be hard to keep careful records when you are busy, but those records do help come income tax time,” says Cawley. “Tracking your travel expenses when you attend a convention can really pay off.”

PHILLIP M. PERRY is a full-time freelance business writer with more than 20 years of experience in the fields of workplace psychology, employment law, and marketing. His byline has appeared over 3,000 times in a variety of business publications.

EVENT CALENDAR



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Naples, Florida

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October 28–29, 2024

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Central States Insulation Association (CSIA)

Contact: Rachel Pinkus

(937) 278-0308, www.csiaonline.org

2024 CSIA Spring Labor Conference

April 29–May 1, 2024

Lexington Griffin Gate Marriott
Golf Resort & Spa
Lexington, Kentucky

Eastern States Insulation

Contractors Association (ESICA)

Contact: John F. DeLillo

(516) 922-7855, www.esica.org

ESICA 2024 Spring Conference

May 8–10, 2024

PGA National Resort
Palm Beach Gardens, Florida

Midwest Insulation Contractors

Association (MICA)

Contact: Rachel Pinkus

(937) 278-0308, www.micainsulation.org

MICA 67th Annual Conference

June 16–20, 2024

Hotel Alex Johnson

Rapid City, South Dakota

Southeastern Insulation Contractors

Association (SEICA)

Contact: Erin Penberthy

(571) 266-3129, www.seica.org

SEICA 2024 Spring Conference

June 23–25, 2024

Hyatt Regency Aruba Resort
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Palm Beach, Aruba

Southwest Insulation Contractors

Association (SWICA)

Contact: Lindsay Konlande

(832) 971-5989, www.swicaonline.org

66th Annual SWICA Conference

June 1–4, 2024

Hyatt Regency Hill Country
Resort and Spa
San Antonio, Texas

Thermal Insulation Association of

Canada (TIAC)

Contact: Robin Baldwin

(613) 724-4834, www.tiac.ca

2024 TIAC Conference

August 21–24, 2024

Delta Hotels St. John's Conference Centre
St. Johns, Newfoundland

Western Insulation Contractors

Association (WICA)

Contact: Robert Bergman

(801) 364-0050, www.wica1.com

WICA Annual Convention

September 15–17, 2024

Fairmont Orchid Resort
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