



IOWPA News



Summer 2021

Quarterly publication of
Indiana Onsite Wastewater
Professionals Association

www.iowpa.org

IOWPA Spring 2021 Events

Full recap with photos!

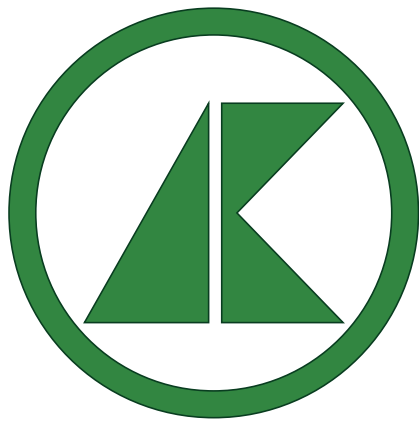
plus

**Why Are Soil
Evaluations Needed?**

**Business Succession
Planning**

**2021 Inspector
Certificate Recipients**

Choosing a Successor



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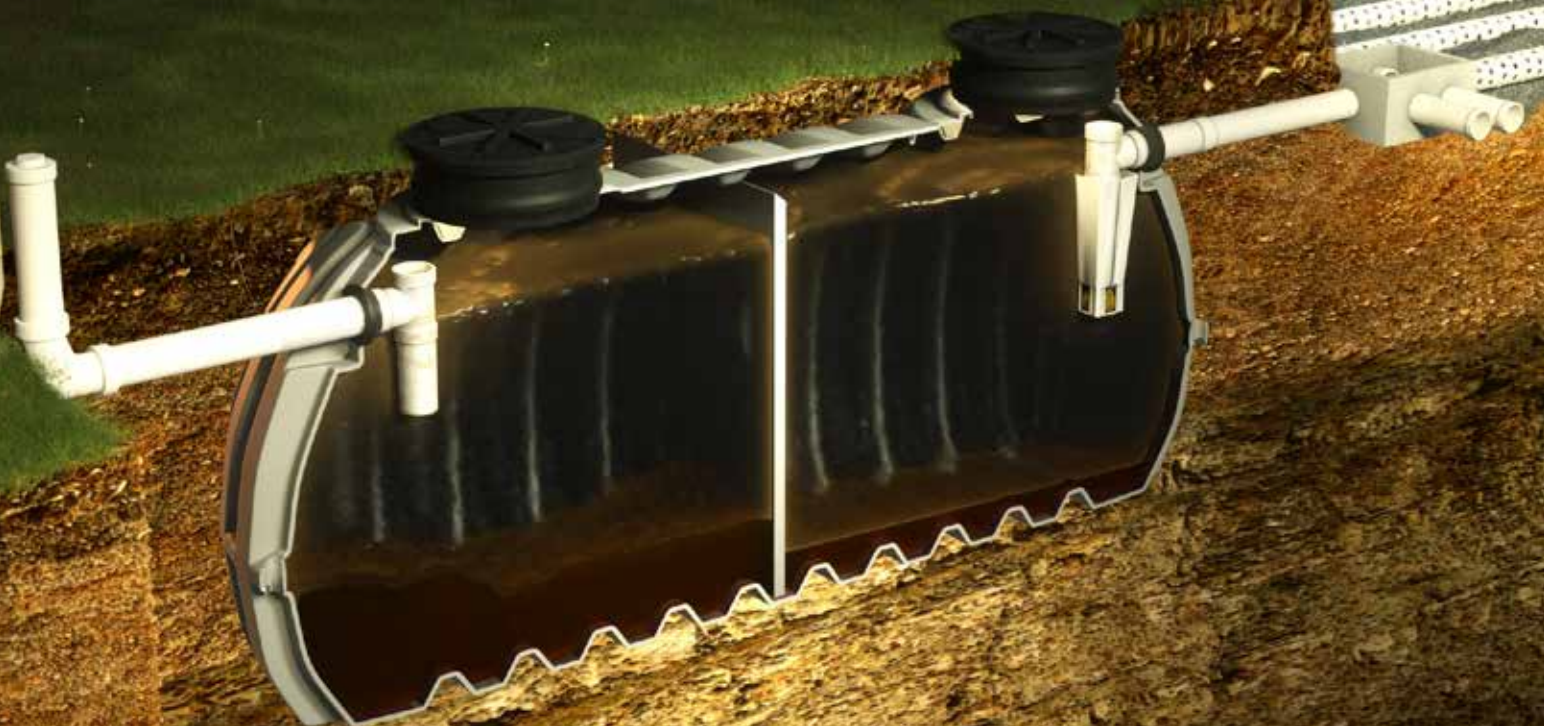
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Summer 2021



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Indiana Onsite Wastewater
Professionals Association
7915 S. Emerson Avenue, Suite 132
Indianapolis, IN 46237
Phone: 317-965-1859 • Fax: 317-204-8763
www.iowpa.org

EXECUTIVE DIRECTOR

Julia Whitson
317-965-1859
indianaonsitewastewater@gmail.com

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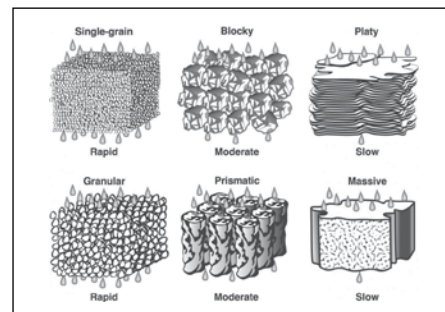
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PRESIDENT'S MESSAGE



Jon Houseknecht

Dear IOWPA Members,

DESTINATION EXCELLENCE. When I worked in the trucking industry, many years ago, there was a large fleet of trucks with these words on the back of the sleeper. These trucks were black with gold lettering, tons of chrome with aluminum rims, very sharp and always stood out. Also, I believe these trucks were washed on a regular basis (very clean). It was, and still is, a sign of professionalism; a goal, an ambition to strive beyond the average. I believe we as IOWPA members should set a goal for destination excellence for ourselves.

No matter what your field of interest is, whether we are installers, inspectors, regulators, soil scientist, educators, or manufacturers reps. We can set a higher standard for ourselves and enhance our industry. I hope you will take on my challenge and share your thoughts with me!

We have several people over the past 18 months who have stepped up to DESTINATION EXCELLENCE who I would like to commend. Joan Brown, who took over as Interim Executive Director and helped us begin the process of refreshing our bylaws. L.A. Brown who sponsored and hosted a field day bringing installers, regulators, and soil scientist together for an open discussion on best practices for installations of systems. Greg Inman for his work on the field day held at Camp Millhouse. What a monumental task this was. I know there are more however my space is limited. Brian Payne for his extensive work on the IOWPA website, what a great advancement for us. Thanks to all who spend countless hours of your time and talents.

During these difficult times IOWPA is listening and adapting to keep our members current on CEU's and certifications. We are extending dates and offering some different opportunities to obtain education thru computer seminars and online classes. I know during busy season it is difficult to find time to travel and sit in a classroom environment. So, I hope you will take time now during the off season to obtain your education and renew your membership.

I would like to take this opportunity to welcome Julia Whitson as our new Executive Director. She has already done an amazing job in the short time she has been with us and look forward to working with her in the coming year.

Thank you all and best wishes for a prosperous 2021!

Jon Houseknecht, IOWPA 2021 President
Sunset Septic and Excavating Inc.

Congratulations to our Spring 2021 Inspector Certificate Program Class



Blake Hull-Cochran, H&H Pro Septic

Brant Ricker, Huntington County Health Department

Brian Zelencik, Pillar to Post Home Inspectors

Caleb Gluff, Gluff Plumbing

Charles Denning

David M. Horein, Home Pro Inspectors, Inc.

Herbert Landers Jr., Landers Trucking & Excavating, Inc.

James Mason Barnette, Barnette Construction

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Jeff Melton, Melton Excavating

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Greg Inman

Infiltrator Water Technologies

800-896-9565

ginman@infiltratorwater.com

Andrew McAfee

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Why Are Soil Evaluations Needed?

Lisa Zeiner, Septic Consultant

Septic systems only work if the soil absorption field area is sufficiently permeable. The absorption field must be able to absorb the effluent flowing into it. The soil is the most important part of the septic system. The soil is the critical last step in treating effluent. Treatment of effluent depends on the time it spends in the soil and the available microbial population of the soil. But what is a soil evaluation?

A soil evaluation is an assessment of the soil performed by a soil scientist. Soil has texture, structure, and order. The soil evaluation tells the story about the area it describes. As with any good story, you plan the plot before you construct the book. Before you construct the septic system, you plan the system. You cannot plan the system without understanding the soil story.

Soils are classified by texture and color. The texture comes from three major components - sand, silt, and clay. Soil color gives an indication of its geological origins and mineral make-up.

The color also indicates the location of the seasonal high water table within the horizons.

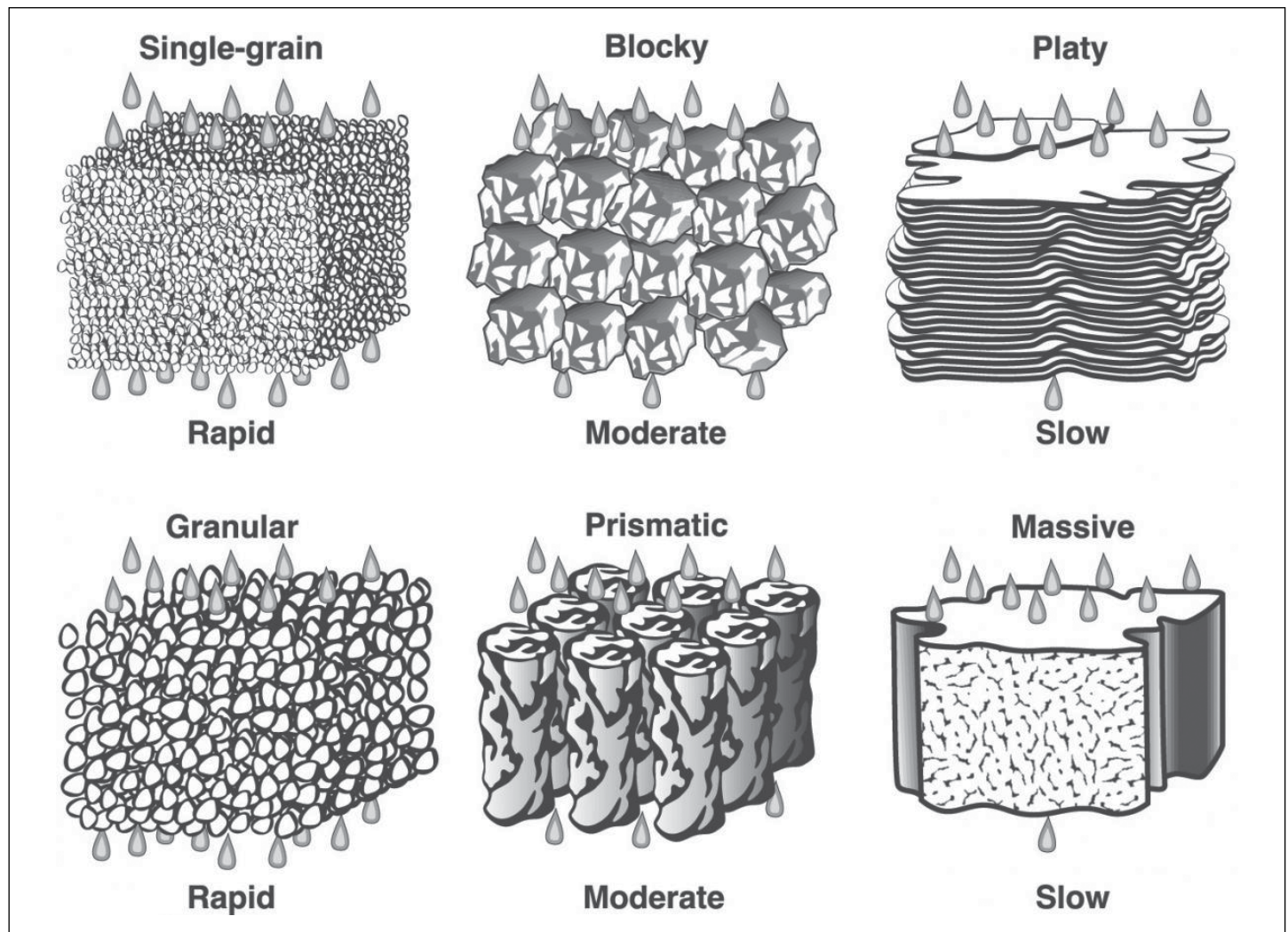
Texture measures how quickly effluent moves through the soil. For example, sandy soil has large grains stacked far apart, which allows effluent to flow quickly. Clay soils are fine grains stacked closely together, allowing effluent to flow slower. Sandy soil also has a lower microbial population to break down solids or pathogens in the effluent. Richly organic soil has a higher microbial population to break down solids and pathogens. Effluent needs to spend time in soil with a sufficient microbial population to treat it. Based on the texture

and color of the soil, the soil scientist determines the suitability of the site for an absorption field. Soil evaluations can be borings (small holes) or a pit.

The soil evaluation determines:

1. Site suitability
2. Type of system
3. Depth of system
4. Seasonal high water table

Without a proper soil evaluation, a septic system could fail. So now what? Stay tuned for the next installment, "How Many Borings/Pits and Where" in the next issue. Also coming soon: "How To Read and Understand A Soil Evaluation" and "Putting It All Together - System Selection"





Spring 2021 Events Recap

As restrictions began to be lifted this spring from the COVID-19 pandemic, we found alternative ways to offer education and training opportunities to professionals in the industry.

SEPTIC LAYOUT AND DESIGN TRAINING

In April, we offered a small-group opportunity for our members to network with one another and do some in-person, hands-on learning covering the layout and design for septic systems. We scheduled a half-day session geared toward new installers where attendees had an opportunity to get their hands on some products, talk through important questions to ask homeowners, and go through the basics of determining the best way to lay out a system and what to look for. The session sold out so quickly that we ended up offering a second afternoon session that same day and offering the program again in June in a different area of the state to accommodate another group.

INSTALLER CERTIFICATE PROGRAM

Because many venues weren't offering accommodations for groups to meet in person, we tested out virtual training for the installer certificate program by offering training material through Zoom over the course of two days for folks interested in sitting for the installer examination. The meetings were set up to allow for Q&A and were recorded to allow attendees the opportunity to revisit the sessions and review anything they wanted to cover a second time before sitting for their exam. Creating the online recorded sessions has given us an opportunity to allow prospective installers to self-study on their own time and at their convenience and has given us the ability to essentially offer the exams on-demand. We partnered for a couple months with Ivy Tech Community College to offer various locations across the state to take spring exams and have switched gears for the remainder of the year offering one in-person exam date each month in various locations across the state. So far in 2021, fifty-two people have taken the installer exam either for the first time or to renew their certificate and we're working on getting more signed up each month.

If you're interested in sitting for the installer exam, you can find the dates and locations being offered online at [iowpa.org/exams-trainings](https://www.iowpa.org/exams-trainings)



INSPECTOR CERTIFICATE PROGRAM

Without an offering of the inspector certificate program in 2020, we had several folks interested in our spring 2021 class. In a similar fashion to the installer program, we offered the classroom training virtually through Zoom over four half-day sessions that were recorded for attendees to be able to review afterward and study for their exams. Field training sessions were held in Plainfield and Rolling Prairie to accommodate attendees who participated from all across the state. The spring inspector program finished up with 16 new certificate holding inspectors. As demand increases for inspectors with an IOWPA certificate, we'll be looking at offering a second program in the fall to accommodate additional folks looking to earn their inspector certificate.

If you're interested in participating in this certificate program, more information about upcoming schedules can be found online at iowpa.org/inspector



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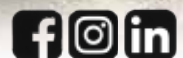


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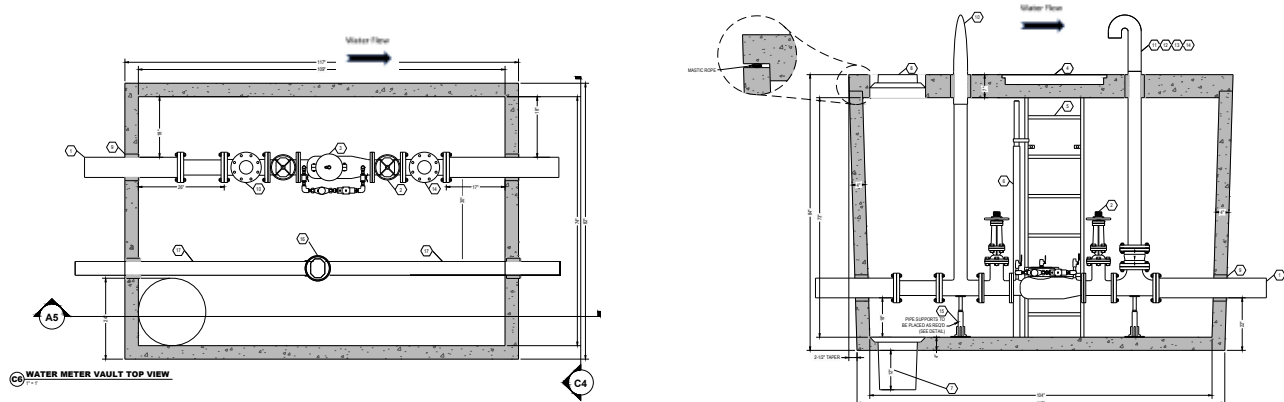
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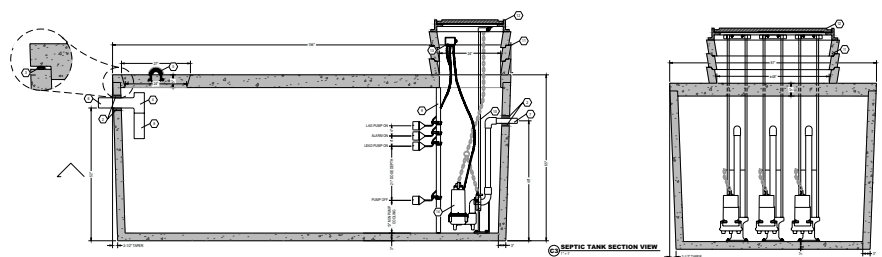
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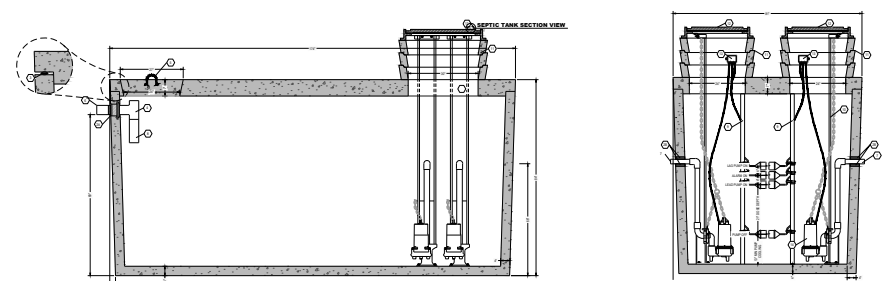
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Business Succession Planning

Renee Wiatt, Family Business Management Specialist, Purdue University

Why Advisors Need to Meet EVERYONE in the Family

Lack of communication can cause unnecessary barriers in succession and slow down the learning and transfer process in any business. Open and honest communication is crucial to determining the wants and needs of both the incumbent generation (senior generation) and the successor generation (junior generation). When goals, values, and intentions are openly discussed, deep understanding and progress towards succession can be made.

Open communication and inclusion are also fundamental when interacting with advisors. An advisor is someone who provides expertise, advice and/or guidance to the business and its associated family. Advisors to the family business can provide a variety of services to both the family and the business, including legal, financial, retirement, insurance, counseling, and technical. Examples of advisors to the business can include attorneys, certified public accountants, certified financial planners, insurance agents, lenders, management consultants, counselors, and respected peers. To illustrate the point of inclusion in advisory meetings, financial advisors will subsequently be discussed.

Financial planners often speak about mistakes surrounding retirement, IRA accounts, stretch distributions, spousal rollovers, Roth and traditional IRA's; the list goes on and on. However, the biggest mistakes are often made due to lack of communication between the recipients of an inheritance (whether it is cash, land, investment accounts) and the financial advisor who managed the funds before the accountholder's death. In fact, one of three beneficiaries have blown through his or her inheritance and has a negative account balance within two years (O'Brien, 2015). Not only is this fact shocking and devastating, it is also an issue that is avoidable given the correct planning.

Consider inclusion versus exclusion.

Every family business is structured differently, whether discussing legal structure, management structure, or ownership structure (not to mention family structure). Communication also varies business to business in terms of who is included in conversations, how much insiders and non-insiders are privy to, and who in the business meets the advisors. Some members of the incumbent generation of a business may not feel comfortable sharing all of the financials with successors, but transitions are easier when individuals are better informed (Wiatt and Marshall, 2016).



Including both the incumbent and senior generation not only opens communication and make the business itself more transparent to its members, it allows advisors to meet the new generation of the business. This early and often meeting will forge a relationship that can ease the growing pains that come with a business transition or succession.

Educate the beneficiaries about financial management.

A predecessor may have spent as many as 80 years gaining knowledge about investment, living within his or her means, and other proper money management strategies. However, beneficiaries could all of the sudden go from putting \$100 in savings a month (in the good months) to having over \$1,000,000 in accounts and assets to manage. Even with using what would seem like “smart” money management techniques (i.e. paying off debts, putting some in savings, contributing to children’s college funds), beneficiaries could face huge taxes and penalties due to early distributions from the predecessor’s retirement account (MFS Fund Distributors). Having a long-term, communicative relationship between beneficiaries, incumbents, and advisors allows the business and the family to create a tax-advantageous strategy that would ultimately maximize the impact of any inheritance.

Include everyone in the conversation with the advisor(s).

Smith (2015) urges families to focus on the beneficiaries to be sure that they are properly informed. Financial literacy, along with the correct advisors involved in every step, can ultimately lead to a successful inheritance transfer within a family and a business. Every generation can benefit from meeting with the family’s advisors. Lawyers, financial planners, bankers, etc. can ensure that the next generation are stewards of what the incumbent generation worked so hard to build. Legacy building in any business starts early and hinges on open communication, inclusion, and strategic planning.

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Choosing a Successor

Renee Wiatt, Family Business Management Specialist, Purdue University

The first step in continuing a business can be selecting a successor or successors, or who will take over the ownership and management of that business. There is a large gap between a business owner's desire for their business to continue and actually taking concrete steps to establish a plan for continuity (De Massis et al., 2008; Venter et al., 2005). The 2012 Family Business Succession Survey conducted at Purdue University (Marshall et al., 2012) indicated that more than 55% of family businesses plan to eventually transfer the business to a son, daughter, or other family member. However, 44% of family businesses had not yet started a management transfer plan and 54% had not yet started an ownership transfer plan. Moreover, less than 20% of family businesses had a written management or ownership transfer plan in place. Without plans, disruptions such as sickness of an owner, death of a family business member, a large loss of sales, or loss of key employees can cause businesses to crumble.

Choosing a successor is a pivotal step in the succession planning process. When a business chooses a successor, they are concretely saying that they want the business to continue into the next generation. Even though it sounds like a simple statement, choosing a successor or successors for a business can take years. Behind choosing a successor can be the tedious task of discovering wants and needs of both the junior and senior generation, educating and grooming the successor, planning for and executing management transfer, planning for ownership transfer, and evaluating financial impacts (such as purchase agreements, business price, etc.).

Data from the 2012 Family Business Succession Survey informed what factors lead a family business to choose a successor. Of the 613 family businesses in the analysis, 441 (71.9%) did not have an identified successor and 172 (28.1%) had an identified successor. family-related matters play heavily into choosing a successor.

If the business owner intended to sell or give the business to family heirs or successors, then that business was 23% more likely to have identified a successor. Having sufficient capital to transfer the business and the discussion of goals also play very large roles in choosing a successor. If the family met with a professional such as an accountant, business consultant, financial planner, or a lawyer to discuss an estate plan, then their likelihood of having a successor increased by 14%. If family business members met at least quarterly to discuss goals, then they had a 9% higher chance of having named a successor versus those businesses who met yearly or less to discuss goals. For each generation added to the day-to-day management of the business, there was a 7% greater chance that they had identified a successor. The senior generations' wishes had a positive influence on naming a successor as well. Businesses had an 11% greater chance of having an identified successor if the senior generation was prepared to give up control of the family business by delegating management to heirs or successors. In summation, the following practices were found to increase the likelihood of having a successor or successors in a business:

- The business owner intending to sell or give the business to family heirs or successors;
- Having sufficient capital to transfer the business;
- Family meeting with a professional such as an accountant, business consultant, financial planner, or a lawyer to discuss an estate plan;
- Family business members meeting at least quarterly to discuss goals;
- Integrating more generations in the day-to-day management of the business; and
- Senior generation being prepared to give up control of the family business by delegating management to heirs or successors.

Family business continuity is a key objective for many. The odds of reaching that goal can be enhanced by families working closely together and by elevating the goal of continuity within the family. Ultimately, developing a continuity plan and implementing that plan is critical.

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