



The National Association for the Employment of People who are Blind

NAEPB Board of Directors Meeting

Monday, June 25, 2018

10:30 AM – 12:00 PM ET

Dial-in number: 1-877-860-3058

Pass Code: 925356

*****Callers should plan to dial in at least 5 minutes prior to the start of the meeting. Please place your phones on mute to minimize background noise. ******

- | | |
|---|------------------------|
| 1. Call to Order | Mabry |
| 2. Board Roll Call | Petach |
| 3. Minutes for Approval
NAEPB Board and Membership Meeting (4/16/18) | Petach |
| 4. Treasurer's Report – attached | D'Amico |
| 5. Consent Calendar Reports | Mabry |
| a. BSC Committee - received | |
| b. Ethics Committee - received | |
| c. Marketing Committee - received | |
| d. Services Committee | |
| e. Strategic Planning Committee – received | |
| 6. Strategic Plan Update – attached | Hawting |
| 7. Operations Committee: Strategic Pricing Committee Update | Fernald |
| 8. Public Policy Committee Update (WIOA and SSDI) | Moneymaker and Vidrine |
| 9. Public Policy Funding Options | Moneymaker |
| 10. President's Update | Mabry |
| 11. NIB Update | Lynch |
| 12. Other Business | Board |
| 13. Adjourn Board Meeting | Mabry |



**The National Association for the Employment of People who are Blind
NAEPB Board of Directors and Membership Meeting**

Monday, April 16, 2018

3:00 p.m. ET

Alexandria, VA

FINAL APPROVED JUNE 26, 2018

Call to Order

The joint meeting of the NAEPB Board of Directors and Membership was called to order by President Reinhard Mabry on Monday, April 16, 2018 at 3:03 PM.

Ms. Petach, Board Secretary, called the Board roll call, after which she announced there was a quorum of the board present. She then called the Membership roll call, of which there was also a quorum.

NAEPB Board Roll Call

Rudy D’Amico	Treasurer
Ken Fernald	Vice President, Operations
Jeffrey Hawting	Vice President, Strategic Planning
David Horton	Vice President Services
Jim Kerlin	Vice President, Marketing
Reinhard Mabry	President
Lou Moneymaker	Vice President, Public Policy
Michael Monteferrante	Vice President, Base Supply Centers
Erika Petach	Secretary
Eric Stueckrath	Vice President Ethics and Practices
Renee Vidrine	Assistant Vice President, Public Policy

NIB Staff Present

Kevin Lynch	President and CEO
Angela Hartley	Executive Vice President
Steve Brice	Vice President and CFO
Andrew Mueck	Vice President, Operations
Jon Katz	Vice President, Business Development
Heather Lyons	General Counsel
Laura Reimers	Vice President, Corporate Communications
Rick Webster	Vice President, Public Policy
Matthew Wieseler	Director, Strategic Intelligence

Agencies Present

Alabama Industries for the Blind
 Alphapointe
 Arizona Industries for the Blind
 ABVI, Rochester
 AVRE Binghamton
 Beyond Vision
 Blind and Vision Rehabilitation Services of Pittsburgh
 BISM
 Bosma
 CABVI (Utica)
 Center for the Blind and Visually Impaired
 Cincinnati Association for the Blind

Columbia Lighthouse
Dallas Lighthouse for the Blind
Olmsted MD Center
Envision
Horizon/ East Texas Lighthouse for the Blind
IB Milwaukee
IFB Solutions
IOB – Greensboro
Keystone Vocational Services
LC Industries
Lighthouse Works! Inc.
Lighthouse Louisiana
Louisiana Association for the Blind
Midwest Enterprises
Mississippi Industries for the Blind
NewView Oklahoma
North Central Sight Services
Outlook Nebraska
RLCB
San Antonio Lighthouse for the Blind
Seattle Lighthouse
South Texas Lighthouse
Southern Tier Association for the Visually Impaired
Travis Association for Blind
Virginia Industries for the Blind
VisionCorps
West Texas Lighthouse for the Blind

Mr. Mabry thanked everyone for attending the meeting.

Approval of Minutes

Mr. Mabry asked for a motion to approve the minutes of the January 23, 2018 Board Meeting. Mr. D’Amico moved, Mr. Stueckrath seconded. The motion was approved unanimously.

Treasurer’s Report – Rudy D’Amico

Mr. D’Amico presented the Treasurer’s Report. The report had been sent to all members with the materials prior to the Board Meeting. Accounts payable are \$72,886 which is made up of \$50,386 which is owed to Dentons for the amicus brief filing, and \$22,500 owed to Tiaht Enterprises for consulting services January through March. Mr. D’Amico reported that a portion of the amount owed to Dentons may be refunded by a participating Source America Agency. Mr. Stueckrath has been negotiating with them, and said he thought the refund should be about \$12,000.

Ms. Petach asked if there will be more legal bills and Mr. D’Amico said there were more expected before the end of FY 2018.

Mr. D’Amico asked for a motion to approve the treasurer’s report. Mr. Kerlin moved, and Mr. Fernald seconded. The motion was approved unanimously.

Consent Calendar – Reinhard Mabry, President

Mr. Mabry presented the consent calendar for approval. Reports were received from the BSC Committee, Marketing Committee, Operations Committee, Public Policy Committee, and Strategic Planning Committee. Mr. Mabry asked for a motion to approve the Consent Calendar Report as submitted. Mr. Fernald moved the calendar be accepted, Ms. Petach seconded. The motion was approved unanimously.

Mr. Monteferrante asked Mr. Lynch if he would discuss the Air force pilot with the BSCs during his update. He said that the pilot is being conducted at six Air Force bases and the data is showing that McConnell Base is trending down. The BSC group is wondering if that is a fluke, or if the data is correct. It has been very difficult to get the data they currently have, and they would like to get more data to see if the pilot is successful. Mr. Monteferrante knows Mr. Lynch has been talking with the Air Force, and hopes he has information to share.

Mr. Fernald called attention to some positive news as a result of efforts of the Operations Committee. The committee has followed up on the customer satisfaction and customer delivery times, and the overall delivery times from the agencies has come up to 84%. They hope to be able to report soon that it is 90%. The final goal is 98%.

Mr. Mabry congratulated all the agencies on their efforts to achieve this rating.

Mr. Mabry introduced the next agenda item "Veteran Stories from NPAs to NIB". Mr. Mabry told Mr. Lynch that he knows NIB had received stories from some of the agencies, but it is apparent that agencies need to be telling more of their good stories. Mr. Mabry mentioned the request from NIB sent to agencies recently asking them to submit the stories of their veterans within the program.

Mr. Lynch agreed he would update on that initiative. NIB is working with Newsweek to do a story in San Antonio with an employee.

Mr. Mabry asked if there were questions on this initiative. Mr. Kerlin said that there are already about 15 stories. He knows there are more agencies that have stories and he would like to have more report to Ms. Reimers and Ms. Hartley to get the stories out on a national level.

Mr. Hawting gave a brief update on the strategic plan. The theme of the advance was to do fewer things better. At the advance, four of the metrics were eliminated and 12 of the remaining 17 were updated to reflect the performance NAEPB is looking for.

There were four main areas or metrics of focus as a result of the advance. One is marketing and telling the stories of the work the agencies do. A second is relationships and the main discussion was to convene a meeting of the G4, which is made up of the President/CEO of NIB, President/CEO of SourceAmerica, and the presidents of NCSE and NAEPB and hopefully include the AbilityOne Commission at some point. The third area was operations and on time delivery and performance.

The fourth metric was employment growth which focuses on several areas, but one in particular is reciprocal purchasing. 33 of the 57-member agencies have signed the reciprocal agreement and it is hoped the rest of the members will sign the agreement this year. Compliance and ETS are also a large part of the employment metric.

Mr. Hawting told the group in updating the metrics, completion dates have been pushed out to be more realistic. Three of the 17 have been completed: scheduling a meeting of the G4, the LinkedIn information sharing and finally, determining if there is a correlation between NAEPB members who actively participate in the group and the number of sales in growing employment. This one has a mixed set of numbers, but it is being worked on.

Mr. Mabry thanked Mr. Hawting for his report and thanked the entire group for helping complete 3 of the 17 metrics. He went on to say that one suggestion from the Retreat was to have a session to discuss the strategic plan for those who were not able to attend the Retreat, and update on any changes to the plan and give an opportunity for everyone to become more familiar with the strategic plan. This will be held immediately following the board meeting if anyone would like to attend.

Mr. Fernald gave an update on the strategic pricing committee. This project has been going on for a year. It is a very complex and complicated process. The team has been meeting every other week via phone for several months. We have done a deep dive into pricing and have invited channel partners and business partners to be on the calls to understand better what they go through and what the commercial practices are that go into pricing.

It is a very challenging process. We have extended the deadline out to the end of December 2018, with the hope to complete the project prior to that, if possible.

Mr. Fernald asked Jenn King (NIB) and Ken Edwards (IFB) to give an update to the board on the face to face meeting which took place in early March and was held at the Louisiana Lighthouse.

Jenn King presented a slide with an overview of the meeting. The purpose of the meeting was to strategize on areas of what the team has accomplished, and where they are going next. From this meeting a small group was formed to begin working on solutions. Jenn turned the microphone over to Ken Edwards.

Ken Edwards explained the group was looking at an item to determine what happens between the time it leaves the NPA and gets to the customer. Mr. Edwards presented a slide to clarify how the many distribution costs involved in moving a product are layered onto the product. There is a lot of work to be done to understand what drives the cost of the products.

Mr. Fernald thanked Jenn and Ken. He said the committee will continue to work on this and will update members regularly. He asked if anyone has information or input to add, please let them know.

Mr. Mabry thanked Mr. Fernald and his committee for their hard work. The members will be very interested in their report at the end of the year.

Mr. Mabry gave the President's update. He commented that the work of board is significant and important, and he appreciates the time everyone puts in on the board.

A meeting of the G4 was discussed at the advance. Mr. Stueckrath established a very good relationship last year with Carol Carr of NCSE (National Council of SourceAmerica Employers), and because of that we were able to confirm a date to have the first meeting of the G4 during the SourceAmerica conference in Indianapolis. Steve Soroka asked if the four principals could meet first to make sure there is a clear agenda before inviting Tina Ballard to a meeting.

The key topics will be the Rule of Two, the 898 panel and opportunities for collaboration.

Following the meeting there will be a dinner attended by executive members of the NCSE and the NAEPB boards.

Mr. Mabry has been working to increase the membership of the NAEPB. He has reached out to the 40 NIB associated agencies who are not members, and Ms. Petach called them all. She had very good discussions about what NAEPB is doing and the benefits of joining the organization. She does not have any new members yet but is working on relationships. Hopefully this will encourage some agencies to join this year.

Another initiative that was discussed at the advance, was ways to share information. A LinkedIn forum has been set up, he has called NAEPB CEOs to share best practices and have ongoing dialogue to help agencies exchange information. As of today, 14 members have joined. This is a test group to see if there is value in this kind of vehicle. If it is found to be useful, other groups can set up similar forums.

Mr. Mabry told the group that Jessica Abrahams has changed law firms and after confirming there would be no conflicts at her new firm, she is continuing to work for NAEPB. Mr. Mabry signed an engagement letter with her new firm on March 29.

Mr. Mabry asked Mr. D'Amico to present plaques to the board members who rotated off the board in January. They are: Dave Wells, Dennis Steiner and Bob Garrett. Mr. Wells and Steiner were present, and Mr. Garrett's will be sent to him.

Mr. Mabry told the group that recently he was reminded of a tradition that was started in 2010 to invite past presidents to the Order of the Tarnished Owl. Past presidents established the order, and the owl was chosen as a symbol of wisdom, because hopefully presidents achieve wisdom during their time on the board.

Mr. Mabry presented a tarnished owl to Mr. Stueckrath and thanked him for his two years serving as President of the board.

Mr. Mabry invited Mr. Lynch to give the NIB update.

Mr. Lynch gave the statistics on the National Symposium. There are just under 500 registered, which is up from the 2017 number. There are 72 employees of the year, with 65 in attendance. The Technology Showcase is set up in the lobby area with seven vendors providing information on accessible technology which is helpful for advocates and employees of the year.

There is an app this year for conference attendees, which has received very positive feedback.

Aria is providing free service throughout the week at the various locations on Capitol Hill on Wednesday, as well as the Newseum.

The training for the employees of the year has been expanded this year to include self-defense.

There are 12 new advocates this year joining the previous classes for a total of 55 from all classes.

Mr. Lynch told the group that the CEO Update was sent out last week. There is a lot of good information contained in this quarterly report. If the CEOs don't have time to read it, he suggested it be circulated to the staff. It may serve to generate questions and open dialogue with your staff.

NIB sales are up for the first five months, running on budget, with a 6% increase over 2017.

March numbers are showing strong performance in commodities, textiles and services business lines. GSA and the US Postal Services are up, and there are increases in services particularly in DOD and VA.

Mr. Lynch and Mr. Soroka received a meeting request from Shay Assad to meet with the four senior acquisition specialists from the four service branches. Mr. Assad wanted to say that DOD realized they can handle the 2% utilization goal internally, however a problem came up with one of the SourceAmerica agencies and this created problems with the Army. There was quite a bit of running around, but Steve Soroka went to his board and it was taken care of.

Mr. Lynch does not know the status getting the 2% goal back on track. Mr. Assad would like to have a meeting with some of the agency CEOs and the acquisition folks to move it forward. He doesn't want agencies to lose money, but it must be looked at very carefully.

The four acquisition specialists are being watched very closely by Congress, so they are unwilling to pay for things that are not cost effective. Mr. Lynch is working on dates with Mr. Assad's office to get the meeting set up.

Mr. Lynch gave up update on Amazon. The GSA-OMB implementation plan has been published and the AbilityOne program was referenced in the plan. NIB will continue to engage their partners and are in the process of talking to the former administrator for small business administration, Joe Jordan, and will also continue to work with Larry Allen to get to the right folks.

Another group NIB has been working with is the Coalition for Government Procurement. This is a member organization of for-profit companies. They wrote a letter to the Commission stating they were upset that they seemed to be signing up with a sole source (Amazon) and asked for a meeting with the Commission.

Barry Lineback attended. He expressed that the Commission sometimes gets ahead of itself and would take a step back.

The Commission is having a meeting with the Air Force and Amazon this week. NIB asked to be invited and were not, so will have to wait to hear the outcome. The question is whether the Air Force is willing to have Amazon block and sub on ETS items.

Mr. Lynch also said that the AbilityOne landing page on Amazon is live, and it is not supposed to be. The Commission has said they would not let it go live without letting all parties know. They indicated that they did not know it was live.

Some of the agencies have ordered from the page, and the items received were not AbilityOne or SKILCRAFT. This is an issue we must be very concerned about as Amazon is not going to go away. The attorneys are checking on trademarks to make sure they are correct and legal.

Mr. Lynch said that NIB is working more closely with SourceAmerica than they have in the past, and we are very happy about it. Mr. Soroka is on board with the Amazon issue as much as NIB.

There will be more coming out soon on the marketing campaign. This year is the 50th anniversary of the U.S. government pen and this will generate a lot of media exposure.

The new building is progressing on schedule and will be a great resource for all the agencies, with better meeting and training spaces. The City of Alexandria approved funding for Metro station and have indicated construction should start by the end of the year.

Mr. Mabry and Mr. Hawting mentioned earlier that about half the members have signed an agreement to buy from each other. We are having great discussions with both SourceAmerica and NCSE about collaboration. Mr. Mabry is going to discuss the desire to have SourceAmerica agencies voluntarily buy AbilityOne products and do it voluntarily rather than making it mandatory. If you have not signed it yet, sign it so we have 100% compliance and then we can carry that message to the NCSE.

Mr. Mabry thanked Mr. Lynch for his update and commented that he and the staff are doing a tremendous amount of work.

Mr. Monteferrante said thank you for the update on Amazon. He has a huge concern that the Air Force, Amazon and the AbilityOne Commission are meeting and that they turned down Mr. Lynch's request to attend the meeting.

The language that has been discussed has been preferred, and that doesn't count. The word is mandatory. Mr. Monteferrante doesn't think that there is enough effort from the AbilityOne Commission to enforce that.

The word from the Retreat was to let Mr. Lynch deal with AbilityOne and have the agencies back off. Mr. Monteferrante feels very strongly that Mr. Lynch should attend the meeting.

Mr. Lynch explained that he was told this was a government to government meeting and so he is not sure why Amazon will be there. He went on to say he has tried to be very positive in communication. Mr. Lynch will discuss this with the board, but the current meeting is not the correct forum to have this discussion.

Mr. Mabry asked if there was any other business to bring before the board.

Mr. Moneymaker asked Mr. D'Amico about the discussion of extending the contract of Todd Tiaht. Mr. Moneymaker has been working with Mr. Tiaht, attending meetings at the Department of Education and others. Mr. Tiaht has made some progress on the WIOA issue and gotten many meetings with Congress.

Mr. Moneymaker would like to propose extending his contract for 90 days if the board would consider rehiring Mr. Tiaht to complete the process. Mr. D'Amico agreed that what is happening is very profound. He has had a number of high-level legislators forward letters to the Department of Education and has made some progress.

The contract was \$7,500 a month, so this would be at the same level for an additional \$22,500.

Mr. Monteferrante pointed out that the group of BSCs still have Mr. Tiaht under contract and are in discussions to extend that contract. NIB is having discussions with him on a contract. Mr. Monteferrante would recommend extending him at a rate of \$4,000 and change the motion.

Mr. Kerlin suggests a capture arrangement where he starts at a lower rate and give him more if he is successful.

Mr. Mabry asked if members agree to funding Mr. Tiaht at a dollar amount to be agreed using our scarce resources.

Ms. Vidrine asked Mr. Lynch what NIB is contracting with Mr. Tiaht for. One of the tasks is to increase our visibility with Congressional members and one way to do this is to get our products into the stationary stores and agree to sell in the store. Mr. Tiaht is assisting with this effort.

He is also working with Rick Webster and Charles Cooper to educate true champions, so we can pick up the phone and call them to say we have this issue, what can you do to help us.

Ms. Vidrine asked if NIB had thought about contracting with him on WIOA and Mr. Lynch said no since NAEPB has contracted with him on that. That issue is going to be driven by the NAEPB.

Ms. Petach said this will be the second extension, and there must be an end in sight.

Mr. Horton agrees that we should retain him at a reduced amount.

Mr. D'Amico said there is a level of work that has already been done to set up appointments and talk with people. Perhaps he should be invited to attend a meeting and give a report.

The proposal on the table is to spend no more than \$22,500. Mr. Monteferrante is insistent that \$12,000 is the maximum amount to be spent. Mr. Moneymaker agreed he will negotiate that with Mr. Tiaht.

Mr. Mabry asked for those in support of extending Mr. Tiaht's contract for \$12,000. Mr. Moneymaker will negotiate with him and let the Board know the result to vote on and approve.

Mr. Mabry asked if there was any other business to come before the board. Mr. Moneymaker made a motion to adjourn and the meeting was adjourned at 4:30.

NAEPB Treasurer's Report
For the Period Ending May 31, 2018
NAEPB Board Meeting June 25, 2018

Please see the financial statements for the period ending May 31, 2018, representing 8 months of activity. The checking account balance was \$4,685 and the savings account balance was \$89,253. Accounts receivable were \$2,500, which consisted of 57 agencies paying out of 60 for the current year.

Accounting fees of \$1,414 have accrued. Total equity at the end of May was \$96,582.

Total revenues for the 2017 fiscal year to date were \$30,084, consisting of membership dues and \$84 of interest income. Expenses year to date were \$134,269, including payments for legal (Amicus Briefs) and consulting (WIOA Lobbyist) services of \$74,230 and \$54,500, respectively. The change in net assets for the fiscal year to date is a loss of \$104,185.

Respectfully submitted,

Rudy D'Amico, *Treasurer*

NAEPB
Statement of Activities
For the Period Ending May 31, 2018

REVENUE	ACTUAL YTD	BUDGET YTD	VARIANCE	Budget 2018
Investment Income	\$ 84	\$ 67	\$ 17	\$ 100
Membership Dues	30,000	31,000	(1,000)	31,000
NIB Reimbursement	0	33,333	(33,333)	50,000
TOTAL REVENUE	30,084	64,400	(34,316)	81,100
EXPENSES				
Accounting Fees	1,349	1,000	349	1,500
Legal Fees	74,230	3,333	70,897	5,000
Consulting Fees	54,500	52,500	2,000	52,500
Website Maintenance	279	1,067	(788)	1,600
Awards / Honors	191	333	(142)	500
Insurance - Liability / D&O	380	800	(420)	1,200
Bad Debt Expense	0	1,000	(1,000)	1,500
Miscellaneous Other Costs	3,340	133	3,207	200
Officers Expenses	0	3,333	(3,333)	5,000
Annual Conference & Retreat	0	30,000	(30,000)	45,000
Service Committee	0	1,000	(1,000)	1,500
Operations Committee	0	1,000	(1,000)	1,500
BSC Committee	0	1,000	(1,000)	1,500
Public Policy Committee	0	1,000	(1,000)	1,500
Marketing Committee	0	1,000	(1,000)	1,500
Strategic Planning Committee	0	1,000	(1,000)	1,500
Ethics Committee	0	667	(667)	1,000
Annual Audit Meeting	0	333	(333)	500
TOTAL EXPENSES	134,269	100,499	33,770	124,500
CHANGE IN NET ASSETS	\$ (104,185)	\$ (36,099)	\$ (68,086)	\$ (43,400)

NAEPB
Statement of Financial Position
As of May 31, 2018

ASSETS

Current Assets

Cash Checking	\$ 4,685
Cash Savings	89,253
Accounts Receivable	2,500
Due from NIB	1,176
Prepaid Expenses	382

Total Current Assets 97,996

TOTAL ASSETS \$ 97,996

LIABILITIES & EQUITY

Current Liabilities

Accrued Expenses \$ 1,414

Total Current Liabilities 1,414

Equity

Opening Equity Balance 200,767

Change in Net Assets (104,185)

Total Equity 96,582

TOTAL LIABILITIES & EQUITY \$ 97,996



The National Association for the Employment of People who are Blind

BSC COMMITTEE REPORT

SUBMITTED BY Michael Monteferrante

VP, NAEPB BSC Committee

June 25, 2018

The last quarter has centered on the agenda discussed over 2 days of meetings on May 16/17 with all BSC Operators at the annual retreat which was hosted by LCI this year. Obviously, the NDAA is of paramount importance and the continued non understanding of what is happening with Amazon and the Commission. Please refer to the attached agenda that we covered.

Of very significant importance is the fact that all of the BSC CEO's agreed to chip in to fund Todd Tiaht for short period to help get the 1.5% across the finish the finish line. Their support and the added contribution of NIB to help get this done is tremendous. Thank you to everyone. There is a strong thread of opinion that all NIB agencies should be participating as it benefits everyone. It was agreed that this subject will be taken up at the board meeting today.

Two Attachments:

1. Final Agenda from BSC Meeting May 15-17, 2018
2. Presentation by Todd Tiaht for BSC Meeting May 16, 2018

BSC Best Practices Committee Meeting

May 15 – 17, 2018

LC Industries
4550 Emperor Blvd
Durham, NC 27703

Phone: 919-596-8277

May 15, 2018

6:00 P.M. (Dinner at Vinnie's)

7440 Six Forks Rd, Raleigh, NC 27615

May 16, 2018

8:00 AM to 8:30 AM (Breakfast) LC Industries

8:30 A.M. – 8:45 A.M. (Opening Remarks)

**Bill Blackton, Ken Barnett &
Michael Monteferrante**

8:45 A.M. – 9:30 A.M. (Legislative Initiatives)

Todd Tiaht

**9:30 A.M. – 10:30 A.M. (NIB Update...Amazon, Army GCSS,
Overview of NIB BSC Policy, etc.)**

Tommy Thomas & Mike Stine

10:30 A.M. – 10:45 A.M. (Break)

**10:45 A.M. – 11:15 A.M. (Stocking and Return Policy for
BSCs and Manufacturing Agencies)
BISM/San Antonio**

11:15 A.M. – 11:45 A.M. (4PL Updates)

11:45 A.M. – 12:45 P.M. (Lunch Served) LC Industries

**12:45 P.M. – 1:15 P.M. (Bottom Line)
Bill Beckett**

**1:15 P.M. – 1:45 P.M. (King Signs)
Dean Holzinger**

**1:45 P.M. – 2:15 P.M. (AJC Sales Group)
Chris LaFollette**

**2:15 P.M. – 2:45 P.M. (RLCB)
Monte Cohen**

2:45 P.M. – 3:00 P.M. (Break)

3:00 P.M. – 4:30 P.M. (HP) Rhonda Brooks

5:45 PM to 8:45 P.M. (Dinner Sponsored by HP)

**Page Road Grill
5416 Page Road
Durham, NC 27703**

NOTE: Hotel Shuttle to Restaurant starts at 5:30 PM...Also a half-mile walk for anyone interested in doing that

May 17, 2018

8:00 AM to 8:30 AM (Breakfast) LC Industries

**8:30 AM to 9:00 AM (Independent Stationers BSC Affiliate Program)
Charles Forman & Tom Ashburn**

9:00 AM to 10:00 AM (Review, revise and update the BSC Best Practices Checklist)

10:00 A.M. to 12:00 P.M. (BSC Agency Updates) All

- 1) Percent Sales Up or Down**
- 2) Percent of Ecommerce vs Brick-n-Mortar Sales**
- 3) Any new significant challenges you are experiencing that we might not be aware of**
- 4) What positive things are happening at your locations that you can share with us**
- 5) What are you trying that was new to attract customers/increase sales...and can you quantify it in your sales numbers?**
- 6) Open Forum to discuss anything anyone wants to talk about**

12:00 P.M. – 1:00 P.M (Lunch) LC Industries

**Next Meeting...NIB/NAEPB Training Conference and Expo
November 14 – 16, 2018 (TBD)
Crystal Gateway Marriott, Arlington, VA**



BSC Best Practices Committee Meeting

May 16, 2018

Federal Legislative Initiatives Overview

Todd Tiahrt

Member of Congress

1995 to 2011

BSC Effort Sponsoring Organizations



- Alabama Industries for the Blind
- Alphapointe
- Beacon Lighthouse
- Black Hills Works
- Blind Industries and Services of Maryland
- Central Association for the Blind & Visually Impaired
- Envision
- IFB Solutions
- IOB
- LC Industries
- Louisiana Association for the Blind
- South Texas Lighthouse for the Blind

Pending Legislative Issues



- Fiscal Year 2019 (FY19) National Defense Authorization Act (NDAA) Chairman's Mark, Sec. 821.
 - AbilityOne contacting goal of 1.5% of DOD obligated funds
- FY18 NDAA Sec. 846. Procurement Through Commercial E-Commerce Portals
 - Phase I complete with GSA report (3 months)
 - Phase II ongoing over (15 months)
- FY17 NDAA SEC. 898 Panel
 - On going activities without visibility
- Base Supply Centers
 - Measurement, Reporting and Audits
 - Report language supporting BSCs
- Workforce Innovative Opportunity Act (WIOA)
 - WIOA Final Rule regulatory revisions

AbilityOne Procurement Goal Timeline



- Pursued a 2% goal over last two years
- FY17 NDAA amendment to establish goal defeated in conference committee (December, 2016)
 - Carried by Rep. Adam Smith, D-WA
- FY 18 Senate Appropriations Committee, Defense Subcommittee (SAC-D) language
 - Passed in the Senate in November, 2017
 - “consider establishing an AbilityOne Program goal of **2 percent of the total value of prime contract awards** for each fiscal year”
- Asked Mr. Shay Assad, Director of Defense Procurement and Acquisition Policy (DPAP) to honor SAC-D language in January, 2018
- Mr. Assad attempts to implement a 2% goal within the Pentagon
 - Received push back from Army of Ft. Polk issue with SourceAmerica
- Requested a 2% goal in meeting with House Armed Services Committee Chairman, Rep. Mac Thornberry on April 25 this year
- May 7th Chairman Thornberry releases FY19 NDAA Chairman’s Mark
 - Includes Sec. 821 with a 1.5% goal for AbilityOne supplies and services
- May 10th House Armed Services Committee (HASC) passes FY19 NDAA by a 60 to 1 vote.

FY19 NDAA Section 821 (1.5% Goal)



- FY 19 NDAA as passed by HASC
- Subtitle B—Amendments to General Contracting Authorities, Procedures, and Limitations
- SEC. 821 CONTRACT GOAL FOR THE ABILITYONE PROGRAM.
- CONTRACT GOAL FOR THE ABILITYONE PROGRAM.—Chapter 137 of title 10, United States Code, is amended by inserting after the item relating to section 2323a the following new section: “§2323b. Contract goal for the AbilityOne program
- **“(a) GOAL.—The Secretary of Defense shall establish a goal for each fiscal year for the procurement of products and services from the procurement list established pursuant to section 8503 of title 41 of an amount equal to 1.5 percent of the total amount of funds obligated for contracts entered into with the Department of Defense in such fiscal year for procurement.**
- **“(b) ANNUAL REPORT.—At the conclusion of each fiscal year, the Secretary of Defense shall submit to the Committee for Purchase From People Who Are Blind or Severely Disabled (established under section 8502 of title 41) a report on the progress toward attaining the goal established under subsection (a) with respect to such fiscal year. The report shall include—**
 - **“(1) if the goal was not achieved, a plan to achieve the goal in the next fiscal year; and**
 - **“(2) if the goal was achieved, a strategy to exceed the goal in the next fiscal year.”**
- **(b) CLERICAL AMENDMENT.—The table of sections at the beginning of such chapter is amended by inserting after the item relating to section 2323a the following new item:**
- **“2323b. Contract goal for the AbilityOne program.”.**

FY19 NDAA Sec. 821 Path



- House Armed Services Committee (HASC) Chairman, Rep. Mac Thornberry's goal
 - Pass FY19 NDAA out of committee this week
 - House floor vote before Memorial Day, 2018.
- Senate Armed Serviced Committee (SASC)
 - Goal is to mark up next week
 - Uncertainty with SASC Chair, Sen. McCain
 - No visibility as to the goal's inclusion in the SASC bill
- Conference Committee schedule (TBD)
 - Goal is FY19 NDAA Conference Committee to meet this summer
 - Historically this process isn't complete until December
 - Last time the NDAA was done in Fiscal Year was 2009
- Once the FY19 NDAA Conference Report is agreed to by Conferees it must be passed by both the Senate and the House
- It then goes to the President to be signed into law.

FY19 NDAA Sec. 821 Process



- The 1.5% goal is good news
 - According to NIB, current AbilityOne transactions are approximately 0.7% of obligated funds
 - Pentagon believes it will increase AbilityOne employment
- The goal will not be without opposition
 - Small businesses see this as competition and may actively oppose
 - Veterans Service Agencies (VSAs) and Veterans owned businesses also may oppose
- This provision needs visible support
 - HASC has 60 of 61 Members vote for FY19 NDAA
 - SASC has 27 Members (Republicans and Democrats)
 - Outcome undetermined
- Long process for FY19 NDAA to become law
 - Vote on floor of House
 - Pass SASC
 - Vote on floor of Senate
 - Conference Committee (HASC and SASC)
 - Final Agreement for FY19 NDAA pass both House and Senate
 - Signed into law by President

FY18 NDAA Sec. 846 E-Commerce Portals



- FY18 NDAA SEC. 846. PROCUREMENT THROUGH COMMERCIAL E-COMMERCE PORTALS.
 - (a) Establishment of Program.--The Administrator shall establish a program **to procure commercial products through commercial e-commerce portals** for purposes of enhancing competition, expediting procurement, enabling market research, and ensuring reasonable pricing of commercial products.
- Task was assigned to GSA by Office of Management and Budget (OMB)
- Implementation Approach GSA will conducted phases as identified in the NDAA legislation, which include:
 - Phase 1 (90 days): Implementation plan and policy assessment (completed March 2018)
 - Phase 2: (90 days + 1 year) Market Research & Consultation
 - Phase 3: (90 days + 2 years) Implementation Guidance
 - Phase 4: (by end of FY19) Potential Initial Rollout
 - Phase 5: (by end of FY20) Assess and Scale Rollout

FY18 NDAA Sec. 846 E-Commerce Portals



- In December, 2017, GSA received public comments concerning the program.
 - AbilityOne providers submitted comments
- On January 9, 2018, GSA conducted a public hearing
 - Kevin Lynch and Todd Tiahrt were on panels
 - Issues for AbilityOne
 - Tax dollars require accountability
 - Socio-economic programs change lives
 - Existing statutes and regulations must be honored
- This program has been requested and lobbied for by Amazon, Overstock.com and other online providers
 - Their goal and testimony was to allow any government procurement card holder purchase products on their commercial websites
 - without statutory or regulatory restrictions for socio-economic programs like AbilityOne
 - Amazon has been lobbying for this program for several years
 - Amazon has highered **15 lobbying firms in the 1st quarter of 2018 and spent \$3.4 Million**
 - According to Opensecrets.org **Amazon expenditures are \$33.7 million (2015 to 2017)**

FY18 NDAA Sec. 846 E-Commerce Portals



- GSA Phase I Report
 - “There are important public-policy considerations which GSA must fully examine, as part of the long-term plan around the portals. These include:
 - Opportunities for small businesses within the portals;
 - Item-sourcing issues and supply-chain security;
 - Existing trade laws and treaties relevant to implementing commercial e-commerce portals; and
 - Unique Government requirements that advance key national interests, for example, the requirement to buy certain supplies from mandatory sources such as AbilityOne and Federal Prison Industries.”
- No guarantees for existing statutes and or regulations will be included in the final version of GSA E-Commerce Portals program.
 - Amazon want to use existing platforms and are actively lobbying against compliance with current statutes and regulations

FY 17 NDAA Sec. 898 Panel



- Sec. 898 “ESTABLISHMENT OF PANEL ON DEPARTMENT OF DEFENSE AND ABILITYONE CONTRACTING OVERSIGHT, ACCOUNTABILITY, AND INTEGRITY”
- Resulted from a CNN report on a SourceAmerica provider
- Inserted into the FY17 NDAA by Chairman of SASC, Senator McCain
- Issue is visibility
 - Congress explicitly designated the Panel as exempt from the Federal Advisory Committee Act (FACA), which would require the Panel to allow access to meetings under certain circumstances.
 - In other words, **NO Public VISIBILITY** into the Panels activities
 - Must rely on second hand information

FY 17 NDAA Sec. 898 Panel Responsibility



- **Legislation as signed into law;**
- **(c) DUTIES.**—The Panel shall—
 - (1) review the status of and progress relating to the implementation of the recommendations of report number DODIG–2016–097 of the Inspector General of the Department of Defense titled “DoD Generally Provided Effective Oversight of AbilityOne Contracts”, published on June 17, 2016;
 - (2) **recommend actions the Department of Defense and the AbilityOne Commission** may take to eliminate waste, fraud, and abuse with respect to contracts of the Department of Defense and the AbilityOne Commission;
 - (3) recommend actions the Department of Defense and the AbilityOne Commission may take to ensure opportunities for the employment of significantly disabled veterans and the blind and other severely disabled individuals;
 - (4) recommend **changes to law, regulations, and policy** that the Panel determines necessary to eliminate vulnerability to waste, fraud, and abuse with respect to the performance of contracts of the Department of Defense;
 - (5) recommend criteria for veterans with disabilities to be eligible for employment opportunities through the programs of the AbilityOne Commission that considers the definitions of disability used by the Secretary of Veterans Affairs and the AbilityOne Commission;
 - (6) recommend ways the Department of Defense and the AbilityOne Commission may explore opportunities **for competition among qualified nonprofit agencies or central nonprofit agencies** and ensure an equitable selection and allocation of work to qualified nonprofit agencies;
 - (7) **recommend changes** to business practices, information systems, and training necessary to ensure **that**— (A) the AbilityOne Commission complies with regulatory requirements related to the establishment and maintenance of the procurement list established pursuant to section 8503 of title 41, United States Code; and (B) the Department of Defense complies with the statutory and regulatory requirements for use of such procurement list; and
 - (8) any other duties determined necessary by the Secretary of Defense.

FY 17 NDAA Sec. 898 Panel



- Sec. 898 Panel Membership
 - Minimum of 18 Members
 - Could be more based on the Chairman's discretion
 - Chairman is Mr. Shay Assad, Director of Defense Procurement, Acquisition and Policy
 - Includes one representative from the AbilityOne Commission
 - Includes a representative of the Commission Directorate of Veteran Employment of the AbilityOne Commission
 - Includes one representative from the DOD Inspector General with oversight of AbilityOne Commission
 - Includes representatives from each of the services, audit agencies of each of the services, several DOJ agents with oversight of JWOD, AbilityOne
- **Major concern:** Change in relationship between the AbilityOne Commission and AbilityOne providers

WIOA Effort Sponsor



- National Association for the Employment of People who are Blind, Board of Directors

Workforce Innovative Opportunity Act



- The Workforce Innovation Opportunity Act (WIOA)
 - Passed Congress and signed into law in 2014
 - Office of Management and Budget (OMB) assigned to the Education Department and Labor Department
 - Education Department (ED) issued their final rule in August, 2016
 - Two issues has surfaced
- “Competitive Integrated Employment” (CIE)
 - The preamble to the Final Rule excludes JWOD / AbilityOne related jobs as competitive integrated employment
 - State Vocational Rehabilitation (VRs) have withheld support and funding for employees of AbilityOne providers
 - VRs now are serving fewer people and lowering their own expectations
- “Homemaker Exemption” (HE)
 - The ED Final Rule repeals the Homemaker Exemption
 - VRs are no longer providing federal funds for education and training of people who are blind who go blind later in life without a declaration that they will pursue employment
- These issues were created by ED and can be corrected by ED
 - Congress could act if ED fails to solve these issues

WIOA Timeline



- ED requested comments on existing regulations last July
 - Comments due by mid September, 2017
 - Approximately 16,000 comments were received
 - Most of the comments were “cut and paste” for National Education Association members about civil rights
 - About 30 comments were sent by AbilityOne providers
 - Re-define CIE to included AbilityOne work environments
 - Reinstate the HE
- Reinhard Mabry and myself met with Acting Director OSERS, Ms. Kimberly Richey in 2017
- Rep. Ron Estes, R-KS, Member of the Education and Workforce Committee sent a guidance letter to Sec. DeVos on CIE and HE in December, 2017
- Reinhard Mabry, Lou Moneymaker and myself met with Mr. Johnny Collett, Assistant Secretary of the Office of Special Education and Rehabilitative Services (OSERS) earlier this year
- Rep. Glen Grothman, R-WI, filed a bill to correct the definition of CIE to include AbilityOne on April 27
- **May 10 OSERS issued a notification of “Proposed Rule Making”**
- Sen. Inhofe has a letter to Sec. DeVos on May 14 for CIE and HE

WIOA Summary



- Excerpt from OSERS Proposed Rule Notification
 - “The **Secretary plans to issue a notice of proposed rulemaking** to amend regulatory definitions in 34 CFR part 361 implementing programs under the Rehabilitation Act of 1973, as amended, made by the Workforce Innovation and Opportunity Act.”
- Awaiting issuance of proposed rule which must follow the Administrative Procedures Act;
 - 5 USC §551 et seq. (1946) The Administrative Procedure Act (APA) **governs the process by which federal agencies develop and issue regulations.**
 - Publish notice in the Federal Register
 - Provide for Public Comments
 - Conduct Public hearings
 - 30 day delayed effective date
 - Standards for judicial review if a person has been adversely affected or aggrieved by an agency action
 - Issuance of Revised Final Rule on WIOA

Summary



- Working in a coordinated effort with NIB
- Fiscal Year 2019 (FY19) National Defense Authorization Act (NDAA) Sec. 821.
 - Protect AbilityOne contacting goal of 1.5% of DOD obligated funds
- FY18 NDAA Sec. 846. Procurement Through Commercial E-Commerce Portals
 - Phase II ongoing over (15 months)
 - Working on compliance with regulations and acknowledgement of AbilityOne
- FY17 NDAA SEC. 898 Panel
 - On going activities without visibility
 - Working to open the door for ongoing hearings.
- Workforce Innovative Opportunity Act (WIOA)
 - Monitoring OSERS process for WIOA Final Rule regulatory revisions



- **BACK UP CHARTS**

2018 Congressional Calendar - House



HOUSE CALENDAR

MAJORITY LEADER KEVIN MCCARTHY

115TH CONGRESS, SECOND SESSION

JANUARY

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
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FEBRUARY

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Background on Metrics



- Small business activity is measured by the federal government
- Small business participation is a priority for the federal government
 - Metrics for various small businesses on standard purchase forms

10. THIS ACQUISITION IS		<input type="checkbox"/> UNRESTRICTED OR	<input type="checkbox"/> SET ASIDE:	% FOR:
<input type="checkbox"/> SMALL BUSINESS	<input type="checkbox"/> HUBZONE SMALL BUSINESS	<input type="checkbox"/> WOMEN-OWNED SMALL BUSINESS (WOSB) ELIGIBLE UNDER THE WOMEN-OWNED SMALL BUSINESS PROGRAM	<input type="checkbox"/> EDWOSB	NAICS:
<input type="checkbox"/> SERVICE-DISABLED VETERAN-OWNED SMALL BUSINESS	<input type="checkbox"/> 8 (A)	SIZE STANDARD:		
<input type="checkbox"/> 13a. THIS CONTRACT IS:		13b. RATING		

- Original Equipment Manufacturers receive small business participation pass downs in government contracts
 - Contract percentage dedicated to small business though set asides
- Both the House and Senate have small business committees
- Gaining the attention of government purchasers must come through metrics for AbilityOne/BSCs.



The National Association for the Employment of People who are Blind

ETHICS COMMITTEE REPORT

SUBMITTED on behalf of the Ethics and Practices Committee including Dick Monaco, Janet Griffey, Jerry Martin and Eric Stueckrath

June 25, 2018

The Ethics and Practices Committee was asked to lead an effort to get all NAEPB agencies to sign the AbilityOne Purchasing MOU. At this time we have 37 of 59 agencies that have signed the document. We requested that they act by June 22 and we will follow up with any agency that has not yet submitted the MOU. State agencies may need to sign a slightly amended MOU to comply with their state purchasing guidelines. We will discuss this and recommend a direction after input from state agency affiliates of NAEPB.

There were no other matters to come before the ethics and practices committee. We will discuss the committee's work regarding code of conduct and board evaluations at an upcoming meeting to be scheduled.

Respectfully Submitted

Eric Stueckrath



The National Association for the Employment of People who are Blind

Marketing Committee Report

Submitted by James Kerlin

VP, NAEPB Marketing Committee

June 25, 2018

Secured additional marketing resource

- NIB secured a full-time, marketing/branding consultant. Briana Shashidharan, resume attached, has been on-board since the week of May 21st.

Marketing Awareness Campaign: RFP

- Proposal sent to 12 marketing communications firms. Agencies include large firms such as Saatchi & Saatchi and Ogilvy along with smaller, boutique firms. Agencies were chosen based on the project's scope of work and the agency's areas of expertise/experience. Agencies represented a mix of geographical locations.
- As of 6/8, five agencies indicated their intent to provide a response to the RFP. The agencies include a mix of local and non-local groups.
- Upcoming Schedule
 - ~~RFP Release: May 17, 2018~~
 - ~~Deadline for questions: June 1, 2018~~
 - ~~Responses circulated: June 8, 2018~~
 - RFP submittal deadline: June 29, 2018
 - Notification to finalists: July 11, 2018
 - Interviews for finalists: Mid July 2018
 - Work begins: No later than July 24, 2018
- Proposal Analysis
 - The NIB communications team will develop a matrix to assess each proposal based on if/how well RFP requirements were addressed.
 - Analysis matrix to be shared with NAEPB marketing committee for input.
- Final Selection

- Two “finalist” agencies will be invited to present at NIB headquarters to determine final selection. Final selection committee members to include: Jim Kerlin, Reinhard Mabry, Kevin Lynch and Angela Hartley

SKILCRAFT Brand Reposition Initiative

- Branding strategy finalized for both products and services
 - All-in with SKILCRAFT
 - Core brand architecture complete
- Next Stage: NIB Communications team is finalizing the timeline and phases for the Visual Brand Identity work which includes four phases:
 - Category research and audit
 - Brand experience + Point of View
 - Design development
 - Execution/rollout
- Per Kaleidoscope, work can be completed in approximately 20-24 weeks. *NOTE: Selection committee approvals will be required at key milestones.*

Product Marketing Initiative

- Discussed standing-up smaller NAEPB marketing committee working group to focus on researching and developing a business case for how best to support our digital, e-commerce stakeholders with our product marketing efforts.
- NIB’s product marketing team will help facilitate

Other

- Schedule NAEPB marketing committee call
- Schedule time in mid-late July for RFP finalists to present to the selection committee (Kerlin, Mabry, Lynch, Hartley)

BRIANA ROBERTS SHASHIDHARAN

Represented by Creative Circle 202.827.2207

EXECUTIVE SUMMARY

Strategic marketer with a passion for consumer insights, product development, and brand success. Analytical and creative decision maker, synthesizing and reacting to data to innovate, differentiate, and grow sales and profitability.

EXPERIENCE

FRUIT OF THE LOOM

June 2014 – June 2016

Marketing Manager, Vanity Fair Brands

Managed two intimate apparel brands – Vassarette and Curvation. Guided brand communication to maximize perception and sales. Responsible for ensuring product development supported business and brand strategies. Led cross-functional teams to ensure business unit success.

- Improved new product operating margin by 27% by collaborating with finance, design, and product development to deliver on goals.
- Grew daywear (slips, camisoles) shipments by over 30% in a declining market by modernizing silhouettes to appeal to new consumers, and filling white space at retailers.

HANESbrands, INC.

June 2009 – June 2014

Assistant Marketing Manager, C9 by Champion

Sept. 2013 – June 2014

For the \$1B brand, managed the Kid's athletic apparel line.

- Led all packaging initiatives to remain consistent with the Men's and Women's businesses, and effectively communicate the most important features and benefits.
- Set pricing for all styles in the line, working closely with sourcing, product development, merchandising and design to maximize profitability for Hanesbrands and Target.

Assistant Marketing Manager, Bali Intimates

June 2010 – Sept. 2013

Coordinated and managed the execution of print and digital advertising strategy for the largest intimates brand in the mid-tier/department store channel.

- Managed custom creative and value-add advertising programs that lifted purchase intent between 60-133%.
- Managed the Bali Facebook page, achieving fan growth during periods of paid media, and periods without media, working with creative agencies to develop engaging content.

For the bra category, assisted in the management of products from concept to discontinuation, working cross-functionally to profitably manage the product lifecycle.

- Launched an \$11MM by-line at Target with new products, packaging, POP, PR and social media.
- Developed sell-in materials for the largest new style launch in Bali history, over 600,000 units/\$22 million retail value.
- Increased inventory productivity/turns by 43% by analyzing sales and inventory quality, discontinuing unproductive SKUs, and adjusting forecasts and targeted inventory levels (TILs) accordingly.

In a declining market, contributed to sales growth in consecutive years, 5% and 9%.

Marketing Assistant, Champion Athletics

June 2009 – June 2010

For the Champion brand of athletic apparel, increased brand equity, awareness and purchase intent through advertising, social media, packaging, and grass roots initiatives.

- Managed brand marketing budget and monthly/yearly accrual processes.
- Managed college intramurals program, increasing Champion brand awareness and preference among key consumer segment.
- Worked across categories (underwear, socks, men's wear, women's wear) to assist in packaging redesign that aligned packaging with brand strategy, increased consistency across channels and categories, and responded to insights gained in consumer research.

Champion Brand Marketing Intern

June 2008 – Aug. 2008

- Analyzed quantitative and qualitative consumer, competitor, and category research; designed and conducted new research including interviews, and focus groups.
- Identified positioning opportunities for Duofold, then developed a strategic promotional plan to raise awareness and relevance among a new consumer segment.

KEANE FEDERAL SYSTEMS, INC., Government Contracting/IT Consulting

Feb. 2005 – July 2007

Proposal Manager

Jan. 2007 – July 2007

- Managed cross-functional teams of business development executives, technical experts, writers, editors, desktop publishers, and graphic designers.
- Analyzed requests for proposals and provided expertise and guidance to the team to ensure compliance.
- Facilitated 24/7 productivity by delegating tasks to an offshore team in India.

Proposal Coordinator

Feb. 2005 – Jan. 2007

- Coordinated and managed the production of multi-volume proposals in response to solicitations.
- Managed and organized a complex team workflow in a high-pressure, deadline-driven environment.

KLING, Architecture, Engineering, Interior Design

May 2002 – Feb. 2005

Marketing Coordinator

May 2003 – Feb. 2005

- Developed brochures and proposals to market professional services to government and corporate clients.
- Managed projects by developing timelines, researching requirements, and collecting and compiling technical information and images.

Project Assistant

May 2002 – May 2003

AVREAFOSTER, Advertising

Assistant Account Executive

April 2001 – July 2001

- Worked with creative teams, print production staff, and clients to develop cost-efficient, strategic advertising and marketing materials.

BSMG Worldwide/Southwest (currently Weber Shandwick), Public Relations, Advertising

Jan. 2000 – Feb. 2001

Assistant Account Executive

Oct. 2000 – Feb. 2001

- Served as day-to-day client contact and communicated the clients' needs to the internal creative team.
- Managed accounts by opening jobs, building project timelines, and tracking billing.

Project Manager

Jan. 2000 – Oct. 2000

- Interacted with publications staff to determine production specifications and closing dates.
- Communicated the mechanical requirements of a project to the agency team, ordered appropriate materials, and shipped materials on time.

EDUCATION

Kelley School of Business, Indiana University, Bloomington, IN

May 2009

Master of Business Administration, major in Marketing

Texas Christian University, Fort Worth, TX

May 1999

Bachelor of Science, major Advertising/Public Relations



STRATEGIC PLANNING SUBCOMMITTEE REPORT – JUNE 25, 2018

The NAEPB Strategic Planning Committee includes the following members:

Rudy D’Amico, Joshua Gould, Jeffrey Hawting, CJ Lange, Libby Murphy, Tammy Owen, Karen Walls, Matt Wieseler (NIB)

The Committee met twice since the NAEPB Advance to discuss the following topics:

- 1. Employment & upward mobility statistics**
- 2. ETS Compliance**
- 3. Correlation between membership engagement and sales/employment growth**

The NAEPB Scorecard was originally designed to provide a concise visual tool to assess the health of the organization and of the broader AbilityOne program using both leading and lagging indicators. The discussion and proposal outlined below to expand the scorecard to include more granular metrics on employment and ETS may appear to take away from the simplicity of the original scorecard. The Strategic Planning Committee welcomes comments/feedback on whether the changes we made are an improvement or not.

Please note, we also updated the Scorecard to include a new column that shows “Previous YTD” metrics so we can assess how we are performing versus the same period prior year.

1. EMPLOYMENT & UPWARD MOBILITY STATISTICS

There is an opportunity to fine-tune the current NAEPB Scorecard to present a more complete employment story, with a focus on both **direct** and **indirect** labor hour reporting and more granular upward mobility data through the lens of both **promotions** and **placements**.

NIB captures seven data points that measure labor hours of which the four most relevant are:

- Promotions of direct labor to other direct labor positions within the NPA
- Promotions of direct labor to indirect positions within the NPA
- Placements of existing NPA employees outside the NPA
- Placements of rehabilitation recipients outside the NPA

Under **Program Stewardship** the Committee updated the NAEPB Scorecard to report both **direct** and **indirect** labor hours growth. We do not report promotions of indirect labor to other indirect labor positions because no direct labor hours are created by that promotion; as such it is not a required data point that NIB or the Commission requires. There has been ~6% increase in indirect hours over the past ten years.

Upward mobility data now includes the promotions of **direct** to other **direct** positions and **direct** to **indirect** positions. Annual goals were either assigned or adjusted as necessary.

The Scorecard also now includes data regarding placements of existing NPA employees outside the NPA, as well as placements of rehabilitation clients to jobs outside the NPA. Please note there was no weighting assigned to the latter data point as not all NPAs offer rehabilitation services.

The Committee agreed to separate out placements from promotions to avoid any sense that we were using placements as a way to inflate upward mobility statistics.

2. ETS COMPLIANCE

Our scorecard currently focuses only on ETS infractions at BSCs, both NPA-operated and non-NPA-operated. Given the high visibility to ETS within the membership and the important role it plays in reflecting the health of the program, the Committee asked NIB to share the additional ETS data points that they collect. The Committee decided to include two new ETS metrics:

- Number of ETS violations from authorized distributors (with annual goal set at zero violations)
- Total ETS sales from the top 15 Authorized AbilityOne Distributors selling on GSA Advantage (with annual goal set at zero dollars)

The Committee also moved these Market Compliance data points to the **Program Stewardship** section of the Scorecard.

3. MEMBERSHIP ENGAGEMENT AND VALUE

Under **Membership Engagement and Value** (refer to Slide 8 of the Strategic Plan), Tactic #3 correlates sales and employment growth with membership engagement/attendance at the NAEPB Advance. With Matt Wieseler’s assistance we are able to present data for attendees and non-attendees alike for both AbilityOne direct labor hours and AbilityOne sales. We reported the growth (or decline) in both actual hours/dollars and as a percentage.

To present an accurate picture without data skewed by the size of the NPA we weighted the data by agency size. The results show that for those NPAs who attended the Advance AbilityOne Direct Labor Hours were slightly higher (2.82% versus 2.5%), but sales were higher for non-attendee members (4.79% versus 2.64%).

The Committee thanks Matt Wieseler for doing the heavy lifting on collecting and assisting with analysis of the data presented on the Scorecard.

REVISED NAEPB STRATEGIC PLAN

The following table reflects progress on the seventeen tactics that fall under each of the five strategic pillars.

Board of Directors	
• Support Roll Out of NIB Employee Satisfaction Survey	Deferred
• Coordinate with NIB to develop a LinkedIn “information center” to share information and best practices	Complete
• Engage G-5 for regular meetings with the Commission	Complete
• Engage NAEPB membership to decide on the 2% set-aside opportunity	On Pace

Public Policy	
• Revised Public Policy strategy for CY2018	On Pace
• Have federal agencies establish goals (shared with BSC Committee)	On Pace
Services	
• Develop business models that can be easily replicated	On Pace
Operations	
• Establish pricing methodology for a Fair and Equitable Commodity Pricing Process	On Pace
• “Mandatory “ support and enforcement	On Pace
• Develop/implement “LEAN” new product introduction process	Behind Pace
• Identify and improve metrics and <u>source</u> of metrics to get better operational results	On Pace
BSCs	
• Establish AD HOC BSC Advisory Board of BSC/NON BSC Agencies	On Pace
• Have federal agencies establish goals (shared with PP/Communications Committee)	On Pace
Marketing	
• Develop long term marketing plan	On Pace
• Develop a national marketing pitch	Complete
• Implement branding strategy for Skilcraft products & services	On Pace
• Develop SKILCRAFT product promotion marketing collaboration	On Pace
Strategic Planning	
• Correlate Sales and Employment Growth with membership engagement	Complete
Ethics	
• Reciprocal Purchasing: “How we fit into each other’s supply chain to create jobs. Give feedback to NIB to make the purchasing process easier” (p.9)	Behind Pace



2018-2019 Strategic Plan

June 25, 2018

FY2017-2019 NAEPB Strategic Plan

To represent the collective interest of its member organizations to enable them to maximize employment opportunities for people who are blind.

Program Stewardship (Strengthen The Ability One Program and Prepare for the Future)

- NAEPB and its members operate ethically for the good of the field and the AbilityOne program.
- Members are transparent, sharing their best practices and skills to mutually improve the field and the people we serve.
- NAEPB strives to maintain open communication and cooperation with its stakeholders, most notably the AbilityOne Commission, NIB, SourceAmerica and NCSE, to ensure the AbilityOne program endures.
- NAEPB strives to collaborate with other blind-focused national organizations for the betterment of the constituents they serve. NAEPB is a thought leader in employment.

Employment Growth & Employment Satisfaction (Grow And Diversify Employment)

- NAEPB strives to expand employment in both volume and diversity, to offer the widest array of job opportunities practical to people who are blind and explores technology to help.
- NAEPB seeks to provide employment, whether within its member agencies or in the broader business community, to any person who is blind who wants to work.
- NAEPB members encourage opportunities for advancement and economic independence for all people who are blind.
- NAEPB seeks to ensure the business and regulatory environment promotes and encourages the AbilityOne program to thrive.

Customer Satisfaction & Operational Excellence (Be Supplier Of Choice)

- NAEPB members seek to be recognized as a best in class supplier to the federal government.
- NAEPB seeks continuous improvement to improve its results and deliver maximum value for its customers.
- NAEPB values its customers and strategic partners who collaborate to enhance job opportunities for people who are blind.
- NAEPB seeks opportunities to improve the efficiency of the AbilityOne program to ensure it is responsive to the needs of the government customer



Membership Engagement and Value (Engage Members and Provide Value)





- Ensure that NAEPB members are provided with the support they need to promote their businesses and their mission within the AbilityOne program.
- Ensure there are forums to address the individual needs and aspirations of the members.
- Promote collaboration and information sharing among and between members to foster the health and vitality of the membership.
- Provide relevant, useful and timely information to the membership.



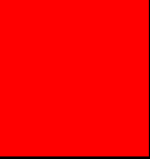

Sales & Business Growth (Grow and Strengthen)



- Promote and encourage policies and initiatives that maximize the growth of the AbilityOne program.
- Encourage initiatives to research new lines of business to diversify business.
- Develop sales and marketing plans and initiatives to promote the high quality lines of business offered by member agencies.
- Promote collaboration between its members to enhance marketability and grow business.






NAEPB Scorecard - 2018








								
PROGRAM STEWARDSHIP	Measurement	Wt	Last Full Yr	Full Yr Goal	Previous YTD	Curr YTD		Source / Comments
Program Direct Labor Ratio	Combined NPA AbilityOne direct labor ratio	25	80.6%	80.0%	81.0%	79.7%		
NPA Compliance	Ratio of NPAs in compliance with labor ratio requirements	20	98.4%	100.0%	95.3%	90.2%		
Market Compliance	Number of ETS violations in Non-NPA BSC's	10	102	90	8	20		Moved from "Employment Growth"
	Number of ETS violations from NPA authorized distributors	10	23	0	4	4		Newly Added Metric
	Total ETS sales of top 15 selling GSA Advantage Authorized vendors	10	\$1,048,340	\$0	\$557,050	\$239,160		Newly Added Metric
NPA BSC Compliance	Percent of BSC inspections w/no ETS violations in FY	10	92.3%	100.0%	100.0%	70.5%		
Support for AbilityOne	Number of AbilityOne Champions	15	157	160	139	166		

								
EMPLOYMENT GROWTH AND EMPLOYMENT SATISFACTION	Measurement	Wt	Last Full Yr	Goal for Year	Previous YTD	Curr YTD		Source / Comments
Direct Labor Hours Growth	Percent change in AbilityOne direct labor hours	25	-1.2%	1.5%	0.4%	2.4%		
Indirect Labor Hours Growth	Percent change in indirect labor hours by NPA employees who are blind	25	-2.1%	3.0%	-1.5%	2.1%		Newly Added Metric
White Collar Jobs	Number of blind employees in AbilityOne service jobs	20	1,085	1,100	988	944		3

EMPLOYMENT GROWTH AND EMPLOYMENT SATISFACTION CONTINUED								
	Measurement	Wt	Last Full Yr	Goal for Year	Previous YTD	Curr Y		Source / Comments
Upward Mobility	Promotions of employees who are blind from Direct to Indirect labor (supervisory)	10	46	50	28	26		Revised Metric.
	Promotions of Direct labor employees who are blind to other Direct labor positions (non-supervisory)	10	123	130	63	52		Revised Metric.
	Placements of existing direct labor NPA employees outside the NPA	10	38	42	22	21		Newly Added Metric
	Placements (not employees of NPAs), e.g. rehab-only clients	N/A	388	427	183	110		Newly Added Metric

CUSTOMER SATISFACTION AND OPERATIONAL EXCELLENCE								
	Measurement	Wt	Last Full Yr	Goal for Year	Previous YTD	Curr YTD		Source / Comments
Delivery Performance	Essendant AbilityOne on time fill rate percentage	40	66.2%	90.0%	59.0%	N/A		
Social Media Followers	Number of NIB Facebook, LinkedIn, and Twitter followers	30	6,591	7,000	6,175	6,878		
NPA Growth	Number of NPAs whose program sales increased YOY	30	28	50	29	35		

MEMBERSHIP ENGAGEMENT AND VALUE								
	Measurement	Wt	Last Full Yr	Goal for Year	Previous YTD	Curr YTD		Source / Comments
Number of Members	Number of NAEPB Member Agencies in Good Standing	35	59	60	59	59		
Member Engagement	Percent attendance at Advance, Symposium, and Annual Mtg	25	73%	75%	57%	85%		% of NAEPB members attending 2018 Symposium
Board Reports	Percent of committees who issue reports at board mtgs	25	89%	90%	69%	71%		5/7 committees issued reports at the April meeting
Member Support	Number of members who receive a grant from NIB	15	36	38	6	30		Includes NPAs approved for grants

SALES AND BUSINESS GROWTH								
	Measurement	Wt	Last Full Yr	Goal for Year	Previous YTD	Curr YTD		Source / Comments
AbilityOne Sales Growth	Year over year sales increase in %		-7.0%	3.0%	-7.0%	7.0%		
AbilityOne Products Growth	Year over year sales increase in %	15	-10.6%	3.0%	-10.9%	6.2%		Now showing Products as a stand-alone result
AbilityOne Services Growth	Year over year sales increase in %	15	25.1%	20.0%	26.2%	11.9%		Now showing Services as a stand-alone result
BSC AbilityOne Sales Growth	Year over year sales increase in %	25	2.2%	3.0%	6.9%	6.8%		
Portfolio Management	Number of projects added to the P/L	25	105	110	39	33		
NPA Project Support	Number of NPAs who added a project to the P/L	20	30	35	20	21		

Program Stewardship

(Strengthen The AbilityOne Program and Prepare for the Future)

Activity/Tactic		Timeline	Goal	Measurement
Description	Owner	Estimated Delivery	Expected	Specific Results
Tactic #1: Revised PP strategy for CY2018	Public Policy Committee	Updated annually by March of each year	a) PP Strategy to support four key initiatives: (1) NDAA, (2) WIOA, (3) VA, (4) Ongoing compliance JWOD Act b) Adopt a clearly defined strategy that will have near-term and long-term impact with results of efforts reviewed annually; c) Adopt a clear and consistent messaging plan to continue year round till the issue is addressed by policymakers or abandoned d) Support Spring NIB Public Policy Symposium e) Revamp AbilityOne Champions program to provide legislative support on an as-needed basis	<ul style="list-style-type: none"> Schedule a public policy summit attended by at least three of the following: VSA, ACB, AFB and NFB to align platform planks # of AbilityOne Champions who align behind NAEPB public Policy initiatives
Tactic #2: Develop long term marketing plan	Marketing Committee	Phase 1. April 16, 2018 Phase 2. May 1, 2018 Phase 3. June 1, 2018 Phase 4. TBD	a) To develop a marketing plan that is national in scope that tells the power of the AbilityOne program story. b) Develop and launch Marketing plan to reach key policy makers including the 4000 members of congress and staff inside the beltway.	<ul style="list-style-type: none"> Phase 1. Develop scope of work and vet with NAEPB Board Phase 2. Do RFP and identify the 3rd party marketing/PR firm. Phase 3. Fully develop national program marketing campaign plan. Phase 4. Launch campaign to policy makers and deliver digital content to NPA family for local use
Tactic #3: Develop a national marketing pitch	Marketing Committee	June 1, 2018	Develop a compelling story around employment of vets within the NIB and AbilityOne programs for a short-term marketing campaign. Focus on support for Veterans/military and the power of our program.	Story developed and launched by National news outlet (e.g. NY Times, Washington Post, etc.)
Tactic #4: Establish pricing methodology for a Fair and Equitable Commodity Pricing Process	Operations Committee	December 2018	a) Secure membership, NIB and AbilityOne Commission consensus of a new pricing methodology that is equitable & strategically positions all programs; b) Establish guidelines that are fair & balanced to ALL while advancing the mission.	<ul style="list-style-type: none"> Submit proposal to Commission and work for approval/adoption
Tactic #5: "Mandatory" support and enforcement	Ethics Committee	September 2018	a) Secure Commission approval of procedure on policing authorized distributors b) NAEPB members to sign MOU supporting reciprocal purchasing c) NAEPB provide clear ordering options for members to support reciprocal purchasing	<ul style="list-style-type: none"> AbilityOne procedure Less ETS violations All NPAs adopt MOU Total AO Sales
Tactic #6: Establish AD HOC BSC Advisory Board of BSC/NON BSC Agencies	BSC Committee	January 2018	a) Secure joint BSC operator MOU committing to support all appropriate new AbilityOne product launches by stocking and testing them in customer-appropriate stores.	<ul style="list-style-type: none"> Total AbilityOne sales

On Pace

On Pace

Complete

On Pace

Behind Pace

On Pace

Employment Growth & Employment Satisfaction

(Grow And Diversify Employment)

Activity/Tactic		Timeline	Goal	Measurement
Description	Owner	Estimated Delivery	Expected	Specific Results
Tactic #1: Develop business models that can be easily replicated	Services Committee	Ongoing	a) Refine Call Center Model and provide best practices on the association website b) Support PROMote program to ensure Technology training is expanded c) Set-up digital accessibility consortium	<ul style="list-style-type: none"> Number of successful new businesses, Number of new AbilityOne jobs Number of Blind employees promoted
Tactic #2: Support Roll Out of NIB Employee Satisfaction Survey	Board of Directors	Q1-2018 Deferred to FY2019	a) NIB announce roll out of survey b) NAEPB board endorse completion	90% of NPAs participate
Tactic #3: Implement branding strategy for Skilcraft products & services	Marketing Committee	1. Build out Brand Architecture – April, 2018 2. Define 5-year Plan – May, 2018 3. Communicate to stakeholders – TBD	Revitalize SKILCRAFT brand strategy which can be used collectively and individually by NIB and NPAs to market SKILCRAFT product and service offerings to prospective customers.	Print and digital media of revitalized SKILCRAFT brand for products and services complete

On Pace

Deferred

On Pace

Customer Satisfaction & Operational Excellence

(Be Supplier Of Choice)

Activity/Tactic		Timeline	Goal	Measurement
Description	Owner	Estimated Delivery	Expected	Specific Results
Tactic #1: Identify and improve metrics and <u>source</u> of metrics to get better operational results in the area of on time delivery and customer satisfaction	Operations Committee	September 2018	Look at supply chain and best practices to improve on time and complete delivery metrics and improve quality.	<ul style="list-style-type: none"> Establish agreed metrics to measure agency performance; distribute to all members Deliver 90% on time and complete performance metric Mentor NPAs with systemic performance issues
Tactic #2: Develop SKILCRAFT product promotion marketing collaboration	Marketing Committee	Ongoing	a) Collect and download all available SKILCRAFT materials from NIB b) Provide all collateral in template format for personalization c) Share access to all NPAs	<ul style="list-style-type: none"> Increased A1 sales Increased blind employment

On Pace

On Pace

Membership Engagement and Value

(Engage Members and Provide Value)

Activity/Tactic		Timeline	Goal	Measurement
Description	Owner	Estimated Delivery	Expected	Specific Results
Tactic #1: Coordinate with NIB to develop a LinkedIn “information center” to share information and best practices	Board of Directors	May 2018	Develop a LinkedIn site where NPAs can either share or request information and best practices Engage NIB to assist with coordination	Tool developed and rolled out to membership
Tactic #2: Engage G-5 for regular meetings with the Commission	Board of Directors	February 2018	To re-engage CNAs, NAEPB and NCSE with the AbilityOne Commission to drive more effective communication among all entities and greater alignment on key issues affecting the program	G5 meeting scheduled.
Tactic #3: Correlate Sales and Employment growth with membership engagement.	Strategic Planning Committee	May 2018	To validate whether a NPA’s participation in the NAEPB Annual Retreat indicates stronger sales and employment growth results.	Compare NAEPB Annual Retreat participants sales and employment growth results with non-participants results

Complete

Complete

Complete

**DIRECT LABOR HOURS

DL Hours Growth	All NPAs	Advance Attendees	Non-Attendees	DL Hours	All NPAs	Advance Attendees	Non-Attendees
Median 3-yr Growth	0.49%	0.55%	-1.35%	Median FY17 Hours	61,657	88,567	29,247
Avg 3-yr Growth	2.41%	1.2%	4.56%	Avg. FY17 Hours	93,049	124,761	44,160
Weighted 3-yr Growth*	2.76%	2.82%	2.50%				

*Weighted by AbilityOne direct labor hours

**ABILITYONE SALES

A1 Sales Growth	All NPAs	Advance Attendees	Non-Attendees	A1 Sales	All NPAs	Advance Attendees	Non-Attendees
Median 3-yr Growth	1.56%	-0.32%	1.38%	Median FY17 Sales	\$ 5,324,860	\$ 12,248,456	\$ 2,120,321
Avg 3-yr Growth	5.86%	2.89%	8.96%	Avg. FY17 Sales	\$ 11,984,634	\$ 16,406,032	\$ 5,064,185
Weighted 3-yr Growth**	2.98%	2.64%	4.79%				

*Weighted by AbilityOne sales

Sales & Business Growth - REVISED

(Grow and Strengthen)

Activity/Tactic		Timeline	Goal	Measurement
Description	Owner	Estimated Delivery	Expected	Specific Results
Tactic #1: Have federal agencies establish goals	Public Policy Committee and BSC Committee	December 2018	a) Enact FAR regulation government-wide to monitor and report on purchases from AbilityOne and promote YOY growth b) A1 “flow down” language in all government contracts c) Continue to collaborate with resources in order to mine data for collection and analysis to demonstrate value of the BSC channel	<ul style="list-style-type: none"> Convince oversight committee to make reporting a requirement Sales growth Job growth
Tactic #2: Engage NAEPB membership to decide on the 2% set-aside opportunity	Board of Directors/Full Membership	May 2018	a) Need discussion on whether both a 2% set-aside and mandatory status can co-exist b) If yes, what is the path to achieving the 2% goal?	<ul style="list-style-type: none"> Membership decision on pursuing 2% goal Path defined to achieve goal
Tactic #3: Develop/implement “LEAN” new product introduction process	Operations Committee	December 2018	a) Develop process map and obtain signed off by NAEPB and NIB b) Review plan with AbilityOne Commission for concurrence	<ul style="list-style-type: none"> Reduce time for P/L addition A1 sales growth

On Pace

On Pace

Behind Pace

2018 Committee Assignments Project Report

- **Board of Directors**
 - Support Roll Out of NIB Employee Satisfaction Survey
 - Coordinate with NIB to develop a LinkedIn “information center” to share information and best practices
 - Engage G-5 for regular meetings with the Commission
 - Engage NAEPB membership to decide on the 2% set-aside opportunity
- **Public Policy and Communications**
 - Revised Public Policy strategy for CY2018
 - Have federal agencies establish goals (shared with BSC Committee)
- **Services**
 - Develop business models that can be easily replicated
- **Operations**
 - Establish pricing methodology for a Fair and Equitable Commodity Pricing Process
 - “Mandatory “ support and enforcement
 - Develop/implement “LEAN” new product introduction process
 - Identify and improve metrics and source of metrics to get better operational results.
- **Base Supply Centers**
 - Establish AD HOC BSC Advisory Board of BSC/NON BSC Agencies
 - Have federal agencies establish goals (shared with PP/Communications Committee)
- **Marketing**
 - Develop long term marketing plan
 - Develop 2-3 national marketing pitches
 - Implement branding strategy for Skilcraft products & services
 - Develop SKILCRAFT product promotion marketing collaboration
- **Strategic Planning**
 - Correlate Sales and Employment Growth with membership engagement
- **Ethics**
 - Reciprocal Purchasing: “How we fit into each other’s supply chain to create jobs. Give feedback to NIB to make the purchasing process easier” (p.9)

Of the 17 total tactics; 1 is shared between two committees (totaling 16 assignments):

- 12 are holdover tactics from PY
- 5 are new tactics for 2018

What's Missing?

- 898 Panel
- Flowdown agreement*

* The Commission regards this matter is “on hold” unless it can obtain the authority to impose a flowdown agreement on the NPA’s.