New to SourceAmerica: Program Overview

Derek Rogers
Sr. Team Manager
Washington DC Field Office
What is the AbilityOne Program?

• It is a Federal Employment program creating jobs for people who are blind or severely disabled by setting aside Federal contracts for the performance by nonprofit agencies employing people who are blind or severely disabled.
Program History

• 1938 – NIB created

  • Created the Committee on Purchase of Blind Made Products

• 1971 – Amended by Senator Jacob Javits of New York
  • Created the Committee for Purchase From People Who Are Blind or Severely Disabled Staff

• 1974 – SourceAmerica created (formerly NISH)

• 2006 - Adopted AbilityOne name
Program Structure
US AbilityOne Commission Responsibilities

- **Establish Policy**
  - Regulations (41 CFR 51-2)
  - Determine suitable products and services for procurement
  - Determine Fair Market Prices
  - Agency decision/reconsideration processes

- **Provide Program oversight**

- **Report annually to Congress**

- **Study and evaluate activities under the Javits-Wagner-O’Day Act**

- **Provide education and information**
US AbilityOne Commission Responsibilities

- Maintain the Procurement List
  - Approve additions/deletions
  - Set the Fair Market Price
  - Make deliberative decision informed by public rulemaking

- Establish and Apply the Suitability Criteria
  - Employment potential
  - Nonprofit Agency qualifications
  - Nonprofit Agency capability to meet quality and delivery standards
  - Impact on current or most recent contractor

- Designate Central Nonprofit Agencies to Allocate Orders
US AbilityOne Commission Organization

US AbilityOne Commission as of October 2015

Tina Ballard
Executive Director & CEO

Kerm C. Jones
Chief of Staff

Kim Zeich
Deputy Executive Director & COO

Timi Kenealy
General Counsel

Amy Jensen
Deputy Director, Compliance

Edward Yang
Chief Information Officer

Barry Lineback
Director, Business Operations

Nancy Myrick
Director, Policy & Programs

Vacant, Deputy Director Compliance

Patricia Briscoe
Deputy Director, Pricing

George Selby
Director, Communications & External Affairs
Central Nonprofit Agencies (CNA)

- SourceAmerica and NIB (National Industries for the Blind) are the two Central Nonprofit Agencies (CNA) designated by the U.S. AbilityOne Commission to provide technical assistance to qualified NPAs that employ people who are blind or significantly disabled on AbilityOne contracts.

- SourceAmerica and NIB are not Federal Agencies.
SourceAmerica Mission & Vision

MISSION
Create employment opportunities and choices for people with significant disabilities

VISION
Employment choices for every person with a disability.
SourceAmerica Strategic Goals FY16-FY18

• Goal 1: Employment Expansion: Create new employment opportunities to expand choices in diverse markets while maintaining existing offerings

• Goal 2: Customer Satisfaction: Continually improve customer satisfaction and loyalty

• Goal 3: Advocacy: Be a leading advocate in the employment of people with significant disabilities

• Goal 4: Excellence and Innovation: Implement strategies to achieve long-term impact on the mission
SourceAmerica Governance

- Governed by a voluntary Board of Directors structured to be responsive to the grassroots within the community

- The Boards includes executives from NPAs, business, legal, government, and AbilityOne Program participants
SourceAmerica Senior Leadership
Thank You

SourceAmerica®
Government Affairs & Public Policy

Ashlie Strackbein
Senior Manager
Government Affairs and Federal Procurement Policy
Agenda

- Who We Are
- What We Do
- SourceAmerica Legislative Agenda
- Grassroots Advocacy
- Tools
- Questions
Who We Are

- John Kelly, Vice President, Government Affairs & Public Policy
- Alicia Epstein, Senior Manager, Disability Policy
- Ashlie Strackbein, Senior Manager, Government Affairs and Federal Procurement Policy
- Ted Archer, Senior Manager, Small Business
- Shari Walton, Senior Manager, Government Affairs and Grassroots Advocacy
- Rachel Kelly, Associate Manager, Government Affairs
- Debbie Ignatz, Senior Manager, State Relations
What We Do

• Serve as an advocate for Nonprofit Agencies and people with significant disabilities
• Monitor, influence and initiate legislative, regulatory and other policy actions at the federal level
• Monitor state legislative activity in all 50 states that impacts employment and disability policy
• Partner with State Use Programs to increase employment opportunities
• Collaborate with the National Council of SourceAmerica Employers (NCSE), National Nonprofit Agencies, and other disability organizations to influence public policy
SourceAmerica Legislative Agenda

• Disability & Employment Policy
  – Workforce Innovation and Opportunity Act
  – 14(c) of the Fair Labor Standards Act

• Acquisition Policy
  – National Defense Authorization Act

• Oversight and Appropriations
  – AbilityOne Program
Grassroots Advocacy Program

- Annual Grassroots Advocacy Conference (by invite)
- 100 Visits Initiative
- AbilityOne Congressional Champions
AbilityOne Congressional Champions

- 4-step process to become a Congressional Champion
  1) Meeting with a Member at their office (in DC or at home)
  2) Tour of NPA or AbilityOne contract site
  3) Statement of support for AbilityOne
  4) Use of AbilityOne products and/or services

- Champion Renewal Program
Advocacy Tools

• Public Policy Updates in SourceAmerica Weekly Email
• SourceAmerica Extranet – Government Affairs
• Capwiz and Action Alerts
• Self Advocacy Program
What You Can Do

• Stay informed
• Build relationships with your elected officials
• Form a Self Advocacy Group
• Take Action!
Thank You

SourceAmerica®
Regulatory, Oversight and Monitoring

Tamara Balenger
Sr. Specialist
Meet the Team

Bill Payne
Sr. Specialist

Kathi DuTilly
Sr. Specialist

Chris Wilkie
Director, ROM

Tamara Balenger
Sr. Specialist

Vickie Fuller
Sr. Specialist

April Murray
Specialist

Debbie Hughes
Assoc. Specialist

Wendy Johnson
Sr. Specialist
Functional Areas

- Regulatory Reviews
- Regulatory Assistance & Training
- Monitoring & Reporting
- Regulatory Affairs & Qualifications

Additional Department “Touch Points”
- Legal, Litigation & Investigation Information Management
- NPA Recommendation Process Appeals
- Cross-Functional Projects Across the CLO
- U.S. AbilityOne Commission Assignments/Workgroups
Regulatory Assistance & Training

<table>
<thead>
<tr>
<th>Academy Training</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Time Studies</strong></td>
</tr>
<tr>
<td>June 8-9 Atlanta, GA</td>
</tr>
<tr>
<td>Aug 3-4 San Francisco, CA</td>
</tr>
<tr>
<td>Oct 19-20 Denver, CO</td>
</tr>
<tr>
<td><strong>Federal Compliance 101</strong></td>
</tr>
<tr>
<td>Jul 20-21 Philadelphia, PA</td>
</tr>
<tr>
<td>Nov 20-30 Phoenix, AZ</td>
</tr>
<tr>
<td><strong>AbilityOne Academy</strong></td>
</tr>
<tr>
<td>Mar 29-30 Vienna, VA</td>
</tr>
<tr>
<td>Jun 21-23 Vienna, VA</td>
</tr>
<tr>
<td>Sep 27-29 Vienna, VA</td>
</tr>
<tr>
<td>Dec 6-8 Vienna, VA</td>
</tr>
</tbody>
</table>

April Murray & Tamara Balenger

**Assistance** - tailored support provided on-site, email, webinar, or conference call.

**Training** – education through either the SourceAmerica Academy scheduled courses, as requested by an NPA, or as Commission directed.

11 Academy trainings scheduled and approx. 20 tailored trainings & assistance visits will be completed in FY16.
Regulatory Affairs & Qualifications

- Collect and initially assess the NPA’s legal documents.
- Review annual reps/certs and process NPA qualification questions (i.e. QER reporting).
- Educate NPAs on topics such as related corporations and current regulatory practices (i.e. Weekly Update articles).

During the FY15 Annual Certification Process, 505 NPA's reps/certs were reviewed.

Did you know – each FY, ROM sends “warning letters” to NPA’s with ODHL ratios below 75%?

Monitoring & Reporting

- Monitor and maintain ROM’s performance matrix and data outcome dashboards.
- Monitor the ROM department’s performance successes, challenges, and key initiatives.
- Analyze NPA’s self-reported data for anomalies.
- Monitor our CNA reporting obligations and produce required reports.
Regulatory Reviews

- Content directly aligns with the Commission’s Compliance Reviews
- When deficiencies are identified, corrective actions are recommended/monitored.
- All Regulatory Reviews are reported to the Commission for review and formal action as needed.

56 Regulatory Reviews completed YTD – target of 140 reviews by end of FY16.
Questions & Contact Information

April Murray
amurray@sourceamerica.org
206-272-3537

Kathi DuTilly
kdutilly@sourceamerica.org
703-584-3986

Bill Payne
wpayne@sourceamerica.org
571-226-4536

Tamara Balenger
tbalenger@sourceamerica.org
571-226-4542

Chris Wilke
cwilke@sourceamerica.org
571-226-4531

Vickie fuller
vfuller@sourceamerica.org
206-272-3537

Debbie Hughes
dhughes@sourceamerica.org
571-226-4540

Wendy Johnson
wjohnson@sourceamerica.org
817-622-7004
Thank You

SourceAmerica®
Field Office Operations

Shane Kanady
Director of Operations
Washington DC Field Office
Field offices are extensions of the SourceAmerica organization, strategically positioned to increase standardized interface, flexibility and response time to our government customers.

This positions us better to maintain our current book of business and increase employment opportunities for persons with significant disabilities.

The strategic positioning of the field offices will also enhances our ability to increase capability of our NPAs.
Field Office Benefits

• Connection to SourceAmerica services and supports
• Connection to the U.S. AbilityOne Commission
• Connection to the Federal Customer
Field Office Structure

• Leadership: Executive Director, Director of Operations, Director of Account Management

• Account Management Support
  • Services
  • Products

• Quality & Technical Support
Account Managers

• Primary points of contact for existing service contracts
• Contract administration assistance
• Problem resolution
• Quarterly partnering meetings
• Annual site visits
• Contract expansion
Products Field Office Support

- Primary points of contact
- Direct reports to Products Leadership
- Assistance and guidance for existing projects
- Problem resolution
- Frequent, needs-based communications
- Annual site visits
Quality and Technical Support Resources

Quality Manager

• Analysis and consulting for NPA quality programs
• Training and assistance for national quality programs

Technical Support Team

• Technical assistance from SMEs
• Process Improvement
• Readiness reviews for new projects
• Operations reviews for current projects
• Performance Improvement Plans
• Training
Field Office Responsibilities

• Promote and protect the AbilityOne Program
• Serve as liaison between NPAs and Federal Government
• Seek new employment opportunities
• Recommend NPAs for AbilityOne projects
• Ensure fair market price and quality service in performance of AbilityOne projects
• Assist NPA partners & Government customers
Thank You

SourceAmerica
New to SourceAmerica:
Field Office Operations
Products Operations
Field Office Concept

Field offices are extensions of the SourceAmerica organization, strategically positioned to increase standardized interface, flexibility and response time to our government customers.

This positions us better to maintain our current book of business and increase employment opportunities for persons with significant disabilities.

The strategic positioning of the field offices also enhances our ability to increase capability of our NPAs.
Products Structure Concept

A centralized, Products National Office with Field Products Account Manager extensions of the primary office and the SourceAmerica organization, strategically positioned to best address unique and diverse requirements while reducing response time to major government customers and key program elements.

This structure positions Products to maintain our current book of business and increase employment opportunities for persons with significant disabilities.

The structure also enhances our ability to leverage and scale NPA Network capability and capacity when beneficial or required.
Field Office Benefits

- Connection to SourceAmerica services and supports
- Connection to the U.S. AbilityOne Commission
- Connection to the Federal Customer
Products Benefits

• Connection to major Federal Customers
• Connection to SourceAmerica Products network components
• Connection to the National Industries for the Blind (NIB) and Federal Prisons Industries (FPI)
• Connection to the U.S. AbilityOne Commission
Field Office Structure

- Leadership: Executive Director, Director of Operations, Director of Account Management
- Account Management Support
  - Services
  - Products
- Quality & Technical Support
Products National Office Structure

- Leadership: Executive Director, Director of Operations, Directors of Federal Account Management (FAM) and NonProfit Account Management (NAM)
- Major Federal Customer Support (Natick, DLA)
- Order Management Support
- Quality & Technical Support
Account Managers

- Primary points of contact for existing service contracts
- Contract administration assistance
- Problem resolution
- Quarterly partnering meetings
- Annual site visits
- Contract expansion
Products Field Office Support

• Primary points of contact for existing producing NPA Accounts
• Direct reports to Products Leadership
• Technical and Operational Account, Line of Business and unique product and project assistance
• Problem resolution, support coordination
• Frequent, needs-based, quarterly communications
• Annual site visits
Quality and Technical Support Resources

Quality Managers

• Analysis and consulting for NPA quality programs
• Training and assistance for national quality programs

Technical Support Resources

• Technical assistance from SMEs
• Process Improvement
• Readiness reviews for new projects
• Operations reviews for current projects
• Performance Improvement Plans
• Training
Field Office Responsibilities

• Promote and protect the AbilityOne Program
• Serve as liaison between NPAs and Federal Government
• Seek new employment opportunities
• Recommend NPAs for AbilityOne projects
• Ensure fair market price and quality service in performance of AbilityOne projects
• Assist NPA partners & Government customers
Products Responsibilities

- Promote and protect the AbilityOne Program
- Serve as liaison between Field Offices, NPAs and Federal Government
- Manage, support relationships with National Industries for the Blind (NIB), Federal Prisons Industries (FPI)
- Recommend NPAs for AbilityOne projects
- Ensure fair market price, quality, on-time delivery performance of AbilityOne projects
- Assist NPA partners & Government customers
Overview of the NPA Recommendation Process

Meghan Gaseor
Sr. Program Manager
NPA Recommendation Process
What is it?

The NPA Recommendation Process is...

• The process by which SourceAmerica determines which NPA(s) will be recommended to the U.S. AbilityOne® Commission to provide a product or service added to or already on the Procurement List (PL)

• Grounded in the regulations that outline the authority of the Commission and the responsibilities that are designated to SourceAmerica as a Central Nonprofit Agency (CNA)
What Can I Read to Learn About the Process?

Two documents comprise the process:

1. Policy
2. Procedure

- Applies to the recommendation of Nonprofit Agencies (NPAs) for the development of AbilityOne® project opportunities, transfer of existing projects, or additional producers to be added to the U.S. AbilityOne Commission’s Procurement List (PL)
- Outlines the suitability criteria areas
- Located on the SourceAmerica Extranet
Where Can I Find These Resources?

**Extranet Page- NPA Recommendation Process**

- Simplified Navigation
- Better Organized
- User Friendly

1. Log-in to the Extranet
2. From the “Home” page, click on “Resources”
3. Click on “NPA Recommendation Process”
Additional Extranet Resources

Small Dollar Pilot Overview (see Extranet Page)

• Launched Oct 1, 2015; 9-month pilot concludes June 30, 2016

• Eligibility parameters of pilot:
  – Projects/opportunities estimated annual contract value = $500,000 or less
  – NPAs with annual AbilityOne sales of $1 million or less will be given priority and preference during the posting’s evaluation process

• Highlights include:
  – Any NPA can submit a response
  – Responses submitted from NPAs outside of the pilot’s sales parameters will not be fully evaluated by SourceAmerica or considered for recommendation in situations where SourceAmerica recommends an NPA that qualifies under the pilot
Where Do I Find the Actual Postings?

SourceAmerica Customer Portal

- The NPA Recommendation Process is managed through a location on the Extranet called the Customer Portal
- The postings will be found in the *Business Development Module*
- To learn about the functionality of the Customer Portal, take the on-line, self-paced training through the SourceAmerica Academy
- Log-in to the Academy at [www.sourceamerica.org/academy](http://www.sourceamerica.org/academy) (NOTE: this is a SEPARATE registration and log-in from the Extranet)
- Search for the “Customer Portal training” on the site
Resources to Obtain Extranet Access

Field Office points of contact for Extranet & Customer Portal access (remember to state you need access to view the postings as well):

- **Atlanta**: Lori Blakely 678-581-7288
  lblakely@sourceamerica.org
- **Chicago**: 847-789-8400
  webrequestncentral@sourceamerica.org
- **Dallas/Ft. Worth**: Tonya Stewart 817-622-7017
  tstewart@sourceamerica.org
- **San Francisco**: Catherine Chase 925-543-5119
  cchase@sourceamerica.org
- **Seattle**: Renee Carroll 206-272-3535
  rcarroll@sourceamerica.org
- **Washington DC**: Krystal Carter 571-226-4696
  kcarter@sourceamerica.org
Final Thoughts - Important Points to Note

- Subscribe to receive posting notifications (instructions on the Customer Portal)
- Take advantage of proposal development trainings offered through the SourceAmerica Academy
- When responding to a posting, consider the following:
  - Read the Response Instructions; thoroughly read the posting and related documentation
  - Demonstrate an understanding of the requirement; assume the evaluators know nothing about your organization
  - Have someone proofread your response – are you responding to what’s being asked?
- Request a debrief from SourceAmerica whether your agency is recommended or not!
Thank You

SourceAmerica
Agenda

• Corporate Communications
• Marketing the AbilityOne® Brand
• SourceAmerica Brand
Corporate Communications
Narratives derived from SourceAmerica’s strategic goals tell the organization’s story.

- SourceAmerica leads the way in support of employment for people with disabilities creating employment opportunities to expand choices in diverse federal and commercial markets.
- SourceAmerica is at the forefront of advocating for people with disabilities at the state and national levels on disability and employment policies.
- SourceAmerica’s environment for innovation in training and research is advancing the customer’s experience to meet tomorrow’s greatest marketplace challenges.
National Outreach

• Design Challenge
• Veterans with Disabilities Intern Program
• Pathways to Careers
• Grassroots Advocacy Conference
• Disability Community Events
  – National Disability Employment Awareness Month (NDEAM)
  – Americans with Disabilities Act (ADA)
NPA Network Outreach

- National Training and Achievement Conference
- National award winners
- Weekly Update newsletter
  - Sign up: weeklyupdate@sourceamerica.org
Strategic Outreach

- Feature stories about SourceAmerica and network members on www.SourceAmerica.org
- Social media (Facebook, Twitter, LinkedIn YouTube)
- Press releases to targeted media outlets
- Promoting SourceAmerica leadership activities
- Promoting AbilityOne Congressional Champions
- Crisis communications/media preparedness and responsiveness
#StartsWithUs

- Visit “The Source,” the communications hub, in National Harbor 9
  - Sign up for social media or public relations 15-minute one-on-one help sessions
  - Pick up a digital press kit
  - Stop by for live Tweeting
  - Catch up on news and updates
Marketing the AbilityOne Program
The AbilityOne Brand

• Program components
  – U.S. AbilityOne Commission®
  – CNAs: SourceAmerica, National Industries for the Blind
    “An AbilityOne authorized enterprise”
  – Producing Nonprofit Agencies
    “An AbilityOne authorized provider”
  – Workforce
    “AbilityOne Employee”
Brand Statement

The AbilityOne Program creates employment opportunities for people who are blind or have significant disabilities to fulfill their potential while delivering a wide array of solutions to the federal government.
Brand Builders

• We don’t “own” the brand
• You play a crucial role in the success of AbilityOne and developing the brand
• Consider yourself a “brand ambassador”
• We measure the brand
  – 9% unaided awareness
  – 32% aided awareness
AbilityOne Program Logo

or

NPA Name
An AbilityOne® authorized provider
AbilityOne.gov Website

AbilityOne Works for America!

Learn more about our history

I want to:
- Do Business with AbilityOne
- Work for AbilityOne
- Become an Authorized AbilityOne Distributor
- Contractors: How to Purchase AbilityOne Products Required by a Federal Contract

AbilityOne Facts
Did You Know AbilityOne...?
- The AbilityOne Program employs more than 45,000 people who are blind or have significant disabilities
- Employs approximately 3,000 veterans, including wounded warriors
- Provides SOLCRAFT® and other AbilityOne products

Quick Links
- Procurement List
- Products
- Services
- FAQs
- Individual Eligibility Evaluation (IEE)
- Agency Shutdown Plan (PDF)

Commission News & Events
- Statement in Response to CNN Story Aired January 21, 2016
- Alley Award Call for Nominations
- U.S. Court of Federal Claims Declines in Favor of Government and AbilityOne Program Regarding Bid Protest
- Statement in Response to CNN Story Aired July 27, 2015

Publications
- AbilityOne Annual Report
- AbilityOne Magazine

Contractors: How to Purchase AbilityOne Products Required by a Federal Contract

The Committee for Purchase From People Who Are Blind or Severely Disabled began operating as the U.S. AbilityOne Commission on October 1, 2011.

Freedom of Information Act
Questions? Direct all inquiries to info@abilityone.gov
(800) 599-0593 | info@abilityone.gov | Privacy Policy | Site Map ©2015 U.S. AbilityOne Commission all rights reserved.
AbilityOne Magazine

- Editorial focus
  - Business-to-business
  - New products and services
  - Successes from NPAs in the AbilityOne Program

- Target
  - Federal procurement
  - Current customers

- Print run: 45,000
- 12-month shelf life
SourceAmerica Brand

IT STARTS WITH US

2016 SOLUTIONS
ADVOCACY JOBS
SourceAmerica offers business solutions you’ll feel good about. Our passion is creating jobs for people with disabilities. We connect customers to a national network of nonprofits who hire talented people with disabilities. Through this valuable network of nonprofits and their employees, we supply products and services that meet the strictest quality standards at a competitive price.
Ad – Federal Procurement Audience

- Contract Management magazine
- Defense News
- Federal Times
Digital Expression

- GovExec.com
- FederalTimes.com
- DefenseNews.com
- WashingtonPost.com
- NCMA website
- Search Engine Marketing
Collateral

SourceAmerica

A WORKFORCE KNOWN FOR EXCELLENCE

AbilityOne
A Great Choice for Federal Customers

Now it's not just easy to be responsible for purchasing in the Federal Government. The task of choosing procurement policies is a challenge and the best opportunities, much less the most opportunities, are hidden behind the veil of opportunity for the workforce negotiated by AbilityOne and SourceAmerica people with significant disabilities.

Created by Congress in 1935 (originally as the Wagner-O'Day Act), then amended in 1973 to become Jobs for Veterans Act, the Act was designed to increase employment and training opportunities for persons who are blind or have significant disabilities through government purchases of goods and services.

The Act established the U.S. AbilityOne Commission to administer the Program, determine which products and services should be procured and sold, and sell the Commission on a Federal Procurement Program. The Commission is also responsible for setting competitive prices and limiting the cost to the Federal Government.

The Act also established the National Council on Economic Opportunity, which is responsible for providing technical assistance to Federal agencies employing persons with significant disabilities.

As a result, SourceAmerica is one of the designated national procurement agencies that use the Federal Acquisition Regulation (FAR) for the procurement of products and services for Federal agencies employing persons with significant disabilities.

The Act requires that Federal agencies and SourceAmerica to streamline acquisition processes and work to eliminate waste in procurement costs and maintain the highest degree of integrity.

A few key facts about the AbilityOne workforce:

- Nearly 100,000 people are employed through the AbilityOne network.
- Veterans make up 56% of AbilityOne's workforce.
- $1.4 billion in average paying through AbilityOne contracts.
- $1.3 billion in quality products and services to the Federal Government annually.
- Operations at nearly 100 locations representing 49 government agencies.
Call to Action – SourceAmerica.org
Finding Your Tools - Extranet
Other Marketing Responsibilities

- SourceAmerica Design Challenge
- National Conference
- National Awards Program
- Videos and Photography
- SourceAmerica Speaker’s Bureau
- Support for NPAs, events, co-branding, and more!
Contact Information

marketing@sourceamerica.org

Carri Nelsen
cnelsen@sourceamerica.org
703-584-3924
SourceAmerica Sales

Lynly Schroeder
Director of Sales
In This Session You Will:

• Receive an overview of the organizational structure of the Sales Team

• Hear how SourceAmerica’s Sales Team supports our mission through
  - Key Agency Focus
  - AbilityOne Sales
  - Federal Non-AbilityOne
  - Commercial Sales
  - Sales Operations Support
Resources and Technical Support

How SourceAmerica works to help Nonprofit Agencies develop capabilities and grow jobs
A Conduit for the AbilityOne Program

- Acquisition strategy planning with each Federal agency for future opportunities
- SourceAmerica is responsible for evaluating and recommending Nonprofit Agencies, similar to Source Selection within the government, to the U.S. AbilityOne Commission® for AbilityOne opportunities
- SourceAmerica provides Quality Control and Line of Business Subject Matter Expert support
- Facilitate contract negotiation and provides startup assistance
- SourceAmerica provides technical support
- Key Agency relationship building
- Offers training by line of business
Key Focus Areas

SourceAmerica Sales is focused on the alignment of staff by functions to drive mission; including:

<table>
<thead>
<tr>
<th>AbilityOne Sales</th>
<th>Federal Non-AbilityOne</th>
<th>Commercial Sales</th>
<th>Sales Operations</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Key Agency Management</td>
<td>• Prime Contractor Program</td>
<td>• CyclePoint</td>
<td>• Subject Matter Expert Support</td>
</tr>
<tr>
<td>• Relationship Account Management</td>
<td>• GSA Federal Supply Schedule</td>
<td>• Staffing Services</td>
<td>• Opportunity Research</td>
</tr>
<tr>
<td>• DoD</td>
<td></td>
<td>• Other LOB’s</td>
<td>• Promotions and Proposal</td>
</tr>
<tr>
<td>• Civilian</td>
<td></td>
<td>• Franchising</td>
<td>• Digital Lead Acquisition</td>
</tr>
<tr>
<td>• Products</td>
<td></td>
<td>• Consumer Products</td>
<td>• Inside Sales</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Packaging</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Key Agency Team Mission

Accelerate the SourceAmerica growth goals within selected Federal agencies by influencing the C-level decision makers that set procurement strategy

- Develop & maintain relationships with senior agency contacts that can influence use of AbilityOne for agency purchasing
- Influence procurement policy to include AbilityOne support/goals and/or use of requirements for AbilityOne vendors at the subcontract level for major acquisitions
- Provide support to sales teams efforts in terms of identifying POCs, educate decision makers and influence policy decisions for specific strategic opportunities
Key Agency Team Goals

• Federal agency opportunities are set aside for SourceAmerica and theAbilityOne Program before going out for bid to others
• Develop and maintain relationships with top level agency decision makers
• Build and maintain collaboration across the SourceAmerica Sales Team
• Provide Subject Matter Expertise (SME) support for assigned accounts
# Key Agency Management Team

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Details</th>
<th>Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patrick Seidel</td>
<td>Director Sales, Key Agencies</td>
<td>Retired Navy Captain; Contracting/Strategic Systems</td>
<td><a href="mailto:pseidel@sourceamerica.org">pseidel@sourceamerica.org</a></td>
</tr>
<tr>
<td>Marie McManus</td>
<td>Air Force Key Agency Executive</td>
<td>Retired Air Force contracting civilian</td>
<td><a href="mailto:mmcmanus@sourceamerica.org">mmcmanus@sourceamerica.org</a></td>
</tr>
<tr>
<td>Chuck Guta</td>
<td>Army Key Agency Executive</td>
<td>Retired Army Colonel; Contracting/Logistics</td>
<td><a href="mailto:cguda@sourceamerica.org">cguda@sourceamerica.org</a></td>
</tr>
<tr>
<td>Gary Hayman</td>
<td>Navy Key Agency Executive</td>
<td>Retired Navy Captain; Contracting/Logistics</td>
<td><a href="mailto:ghayman@sourceamerica.org">ghayman@sourceamerica.org</a></td>
</tr>
</tbody>
</table>
Federal Sales

Service and Product Lines of Business
SourceAmerica Top Customers FY15

$684,926,566

$700,000,000

$600,000,000

$500,000,000

$400,000,000

$300,000,000

$200,000,000

$100,000,000

$0

Army  |  Navy  |  DLA  |  Air Force  |  GSA-PBS

$342,834,094  |  $202,887,849  |  $251,568,378  |  $238,691,056

NOTE: Cognos Project History 12-7-15
Service Lines of Business

- Administrative
- Commissary Shelf Stocking
- Contact Center / IT Support
- Custodial
- Document / Records Management
- Electronics Recycling
- Fleet Management
- Food Services
- Grounds Maintenance
- Healthcare Environmental Services
- Kitting
- Laundry
- Secure Document Destruction
- Secure Mail
- Supply Chain Management
- Total Facility Management
Contact Center and IT Support

• AbilityOne solutions provide contact center, helpdesk and switchboard services while creating 1,200 jobs
• More than 20 nonprofits currently support over 30 AbilityOne projects
• Federal market opportunities will be aggressively pursued to capitalize on the high-growth potential of this LOB
• Commercial market, Prime Contractor Program, sub-opportunities, purchase/acquisition and other approaches are being evaluated in an effort to drive business growth
  – SourceAmerica is currently meeting with many nonprofits interested in entering into the contact center LOB to rapidly expand a sustainable footprint
Document and Records Management Services

- More than 152 Federal mail-service related contracts valued at over $61.3 million
- Document Management services for 15 Federal government contracts valued at over $25.6 million dollars annually
- Mail and life cycle information management
- Brings the latest technology and high level security to any project
- National consolidated service customers include IRS, DHS and Air Force
- Major cost savings through consolidation of all records management, including mail, under one contract
Supply Chain Management Solutions

- $865 million Federal market
- $71.8 million in 35 AbilityOne contracts
- Over 720 jobs
- Manage and deliver 1000’s of line items & >$500M inventory safely/on time every year
- Accuracy and on-time delivery rates among the very highest in the industry
- National Nonprofit Agency Network
  - Expanded footprint
  - Non-location specific solutions
Total Facilities Management

AbilityOne provides full range of complex facilities management solutions for hospitals, buildings and military bases

- 21 years of proven experience
- $369.2 million annually
- 62 contracts nationwide
- 51 facilities nationwide
- Quality Control Management
- Safety-Focused
- Regulatory Compliance
AbilityOne Traditional Products

- Clothing, Textiles & Individual Equipment
- Food Processing and Packaging
- Supplies and Equipment
  - Hardware, Office, Medical
- Manufacturing & Development (M&D)
AbilityOne Products Priority

• The AbilityOne order of priority for Products:
  1. Federal Prisons
  2. NIB
  3. SourceAmerica

• Some Categories are prioritized more than others
  – Office Supplies and Equipment
  – Medical Supplies and Equipment
Products Business Development

• Traditional Business Development
• Manufacturing & Development (M&D)
• Commercial Business Development
  – Non-government business
  – Retailers
  – Distributors
  – End users (ex. Law enforcement, industrial, etc.)
Cindi Worley  AVP, AbilityOne Sales  
cworley@sourceamerica.org

Paul Donohue:  AVP Commercial  
pdonohue@sourceamerica.org

Heidi Silvey Garner  Global Sales Director  
hgarner@sourceamerica.org

Patrick Seidel:  Key Agency Director  
pseidel@sourceamerica.org

Leo Devora:  Army / Air Force Director  
ldevora@sourceamerica.org

Polly Colby:  Navy Director  
pcolby@sourceamerica.org

Lynly Schroeder  Civilian Director  
lcschroeder@sourceamerica.org

Melissa McKenzie  Federal Non-AI Sales Director  
mmckenzie@sourceamerica.org
Sales Operations
Staff assigned to support the SourceAmerica sales team with all sales documents, proposal actions, and promotion of SourceAmerica through tradeshows and events. The Promotions and Proposal Support Group will manage:

- Creation and content management for all Sales team presentations
- Proposal development and management for all RFP, RFQ responses within the Federal Non-A1 and Commercial channels
- Creation and content management for all Sales team written customer documents
- Management of all SourceAmerica tradeshows events and exhibits
Inside Sales Team

Dedicated resources to support lead generation, qualification, and engagement with a focus on converting prospects into interested customers

- Inbound Lead engagement and warm-up
- Outbound calls and lead development
- Link between our demand generation in the digital space and high quality leads that the sales teams can convert into opportunities and wins
- Analytics, metrics, customer service, and more
The Line of Business work group consists of several bona fide subject matter experts (SME) who know what it takes to do a particular job through their thorough knowledge, experience, and industry certifications.

The current line of business SMEs are:

- Laundry Services
- Supply Chain Management
- Document and Records Management
- Contact Center/IT Support

In addition, our work group also supports and manages the external consulting contracts for each of the LOBs listed as well as for Fleet services.
Systems Support Team

Analysts and systems experts responsible for identifying new opportunities, business intelligence, research, analytics, and managing the development and processing of all AbilityOne program Procurement List Addition activities and transactions. The Sales System Support team will manage:

- PL Addition transactions
- New opportunity identification in all channels (AbilityOne, Federal Non-A1, Commercial, Products)
- Pipeline development (Opportunity review and qualification) in all channels
- Business intelligence support (Industry and customer trends, procurement data, customer activity analysis)
- Management, analysis, and data integrity for all sales team reporting (dashboard, fiscal year scorecard and results)
Digital Lead Acquisition Team

As a completely new role and function the Digital Lead Acquisition group will optimize the organizations lead generation efforts. This will be accomplished through engagement of industry best practices to promote SourceAmerica’s solutions via digital channels to include internet, website, and social media. The Digital Lead Acquisition team will:

• Coordinate and execute the promotion of our business lines
• Engage our prospects in our channels and verticals within the digital space
• Take SourceAmerica into the present by leveraging social media, email “blasts”, thought leadership in our areas of expertise and more
• Focus on one primary goal: Creating an exponential pool of prospects and leads that can be converted to customers
# Sales Operations Team

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ryan Blackman</td>
<td>AVP, Sales Operations</td>
<td><a href="mailto:rblackman@sourceamerica.org">rblackman@sourceamerica.org</a></td>
</tr>
<tr>
<td>Paul Koepfinger:</td>
<td>Line of Business Director</td>
<td><a href="mailto:pkoepfinger@sourceamerica.org">pkoepfinger@sourceamerica.org</a></td>
</tr>
<tr>
<td>Nancy Yoder:</td>
<td>Promotions &amp; Proposal Director</td>
<td><a href="mailto:nyoder@sourceamerica.org">nyoder@sourceamerica.org</a></td>
</tr>
<tr>
<td>Frank Gidcumb</td>
<td>Systems Director</td>
<td><a href="mailto:fgidcumb@sourceamerica.org">fgidcumb@sourceamerica.org</a></td>
</tr>
<tr>
<td>TBD:</td>
<td>Digital Lead Acquisition Director</td>
<td></td>
</tr>
<tr>
<td>TBD:</td>
<td>Inside Sales Director</td>
<td></td>
</tr>
</tbody>
</table>
Commercial Sales
Today’s Topics

• About Commercial BD
• CyclePoint eRecycling
• Staffing Services
• Other LOBs & Franchising
• Q & A
Commercial Sales

- Shrinking federal budget
- Pressure on agencies to reduce
- Enormous commercial opportunities
- The NPA Network has market value
- Increased awareness of social mission
- Sec 503 of Rehabilitation Act
  - nationwide 7% utilization goal for qualified IWDs
- Capture/convert to PL
CyclePoint – The Vision

• Current State of eRecycling
• Opportunity that exists for national player
• Harnessing the power of the NPA network
• Large job potential
Significant Market Opportunity
Billions lbs/year

8% Growth (CAGR)

eWaste Landfilled or Incinerated

21% Recycled in 2012

Recycled 16% CAGR

2025 Projected 54% Recycled
CyclePoint

CyclePoint National eRecycling Network

- **Intake Customers**
  - Collectors
    - Tier 1
  - Demanufacturers
    - Tier 2
  - MACs
    - Tier 3

- **End Customers**

**Local eWaste collection services**

**Demanufacture or refurbish eWaste from Tier 1**

**Shred, densify, sort, and sell output commodities**
CyclePoint

- CyclePoint status
  - Launched: 1/4/15
  - Actively Recruiting new NPA members
  - CyclePoint University for network members
  - Will include SDD and other recycling services
Staffing Services Program

SERVICE OFFERINGS
• Temporary/Contract Labor with a minimum of 30 day placement
• Temp to Hire, with 90 day (at 40hr/work week ) conversion terms
• Direct Hire with a flat fee

VALUE PROPOSITIONS
• Section 503 compliance and other diversity hiring objectives (Veterans)
• Customer Management, offering a single point of contact, negotiated pricing
• Vendor Management, distribute work to vetted NPA Supplier, monitored performance
• Training, offering needed Workplace Disability Awareness (DA) Training for hiring managers to facilitate disability inclusion in the workplace
• Increased retention, by placing quality, reliable candidates
Staffing Industry Trends

- 4.7 million job openings in the U.S.
- 3.15 million temporary (contractor) workers per week
- Up 5.6% over last year
- Between 7000 staffing agencies (most with multiple locations)

Staffing Services Program

Top Tier NPA Staffing Supplier Profile:

• SSP office will establish profile criteria for operational readiness; key performance indicators will include:
  – Time to Fill: 48 hours
  – Fill Rate: >80%
  – NPA Business portfolio consist of <20% internal placements
  – *NPA Business portfolio consist of >60% non-AbilityOne contract placements*
Staffing Services Program

NPA eligibility requirements:

- SSP office will establish distribution criteria in order to ensure greater probability to successful services delivery:
  - Geography, infrastructure and systems to perform remote contracts
  - Occupational Placement History: (i.e., >60% in light industrial placements, may not initially be considered for a Call Center contract)
  - NPA must be current with any/all SourceAmerica financial obligations
Staffing Services Program

NPA eligibility requirements:

- NPA must commit to the intent to employ people with disabilities (Commercial Business unit has not established a ratio % and this matter is currently under review)
- NPA must sign NPA Staffing Network Agreement
- NPA must agree to Management Fee
- NPA must agree to utilize MSP technology platform (Vendor Management System)
Commercial Lines Under Development

• Supply Chain Management
• Reverse Logistics
• Total Facilities Management
Why Supply Chain Management

Supply Chain Management
• North America 2012 - $171B
• North America 2015 Est. – $203B

Reverse Logistics
• Estimated Current Market - $150B / $200B

DoD Equivalent to Reverse Logistics – DLA Disposition Services
(Formally Defense Reutilization and Marketing Services DRMS)
SCM / Reverse Logistics Functions

Supply Chain Management

Complete Warehouse Management
- Inventory Control
- Warehousing/Storage
- Order Fulfilment
- Packaging and Kitting
- Distribution
- National Cross Dock Functions

Advanced Services
- Manufacturing and Development
- Marketing
- Forecasting
- Sourcing / Procurement
- Inventory Control
- Warehousing/Storage
- Order Fulfilment
- Packaging and Kitting
- Distribution

Reverse Logistics
- Merchandise Breakdown and Redistribution
- Warehouse Operations and Support
- Repackaging
- Salvage / Sales
- Recycling
- Unused Goods Returns
- Remanufacturing
Cross Selling Strategic LOBs

LOB Synergy

• Consumer Products Packaging
• Contact Services (Order Placement/Fulfillment)
• Warehouse Staffing (Seasonal)
• CyclePoint (Reverse Logistics Electronics/Data Scrubbing)
• Document Management
• Transportation
• Products
Supply Chain Management Commercial Customers

Targeted Potential SCM / Reverse Logistics Customers

Wal-Mart Stores
General Motors
Ford Motor
General Electric
Verizon Communications
Boeing
Home Depot*
Kroger
Cardinal Health
Hewlett-Packard*
Sears Roebuck*
Procter & Gamble
Albertson's
Kmart
Dell*
Lenovo*
Sears*
Verizon Wireless*
Best Buy*

Costco Wholesale Safeway
Johnson & Johnson $J.C. Penney
Motorola
United Technologies 7.0
PepsiCo
Intel*
Sprint
Walt Disney
Lucent Technologies
Walgreen
Genco*
Canon*
Green Wave Computer Recycling*
Acer*
AT&T Mobility*
Rite Aid*
Google*

* Members of the Reverse Logistics Association
Why Franchising?

- Business Diversification
- Proven Business Models
- Market Acceptance
- Job Creation
- Revenue/Profit Creation
- SA Terms and Conditions Negotiated for NPA Network
Participating Franchisors

- National Maintenance Contractors
- UPS
- LINK Staffing Services
- Papa Murphy's
- Auntie Anne's
- Zerorez
- Milex Complete Auto Care
- AUTO-LAB Complete Car Care Centers
- DOMA Technologies
- College Hunks Hauling
- ikor
- Coffee Beanery
Commercial Sales Team

Ellen Telander: CyclePoint NPA Channel Manager
etelander@sourceamerica.org

Denise Carter: Staffing Services
dcarter@sourceamerica.org

Gene Ficarra: SCM/Commercial Lines
gficarra@sourceamerica.org

Paul Donohue: Franchising
pdonohue@sourceamerica.org
Thank You

SourceAmerica®
SourceAmerica Training Overview
Ana Rodriguez, Ed.D.
Director of Training
What you will learn:

After this session, you will be able to:

• Describe how SourceAmerica training helps you and your NPA build capability and capacity to grow and prepare for AbilityOne and Commercial contracts

• Access SourceAmerica training resources
What you will learn:

SourceAmerica training resources help you and your NPA develop the capability and capacity to grow and prepare for AbilityOne contracts.
Training Goals

• Link learning and development to key strategic goals to include:
  – Business Development
  – QWE for People with Significant Disabilities
• Provide learning and development to support the introduction of new products and services
• Accelerate the development of individuals, support employee retention, growth, and succession
• Empower employees to drive self-development with management support and guidance
• Create a systematic and measurable approach for increasing accountability for life-long learning
SourceAmerica Training

- Provides 90+ formal classroom training courses
- Provides on-site training courses
- Assists with NCSE training and events
- Arranges and manages the annual SourceAmerica National Training & Achievement Conference
- Provides eLearning courses
SourceAmerica Training

• Provides Executive Book Clubs
• Manages Lending Library
• Provides Webinar series
• Provides self-study/distance education programs (AMA Certification and Harvard Manage Mentor)
• Oversees NPA training financial assistance; e.g., scholarship and training incentive (voucher) programs
What can SourceAmerica Training provide for your organization?
Helps Your Organization

- **Attract talent**
  - Training is a strong recruiting tool
- **Develop talent**
  - More qualified employee population
  - Learning Plan for professional development
  - Certifications and curriculum paths
- **Retain talent**
  - Increase employee retention
  - Career path development and recognition
- **Manage costs effectively**
  - Reduce travel through eLearning and Regional instructor-led training (ILT) and Onsite training (OST)
  - Maximize productivity
  - Ensure consistent standards and best practices
What Types of Training

Instructor Led Training
Instructor-Led (ILT) training via:

- Classroom courses offered throughout the year around the U.S.
- On-site workshops (OST) at NPAs by request on 30 topics
- Webinars
- National Training & Achievement Conference
New ILT Courses in 2016

• Advanced Proposal Development: Building Compelling Responses
• Cleaning SourceAmerica Smart – Custodial for Supervisors and Job Coaches
• Cleaning SourceAmerica Smart – Custodial Workloading and Estimating Basics
• Working at the Speed of Trust
What Types of Training

Online Training
Distance Learning
Lending Library
Webinars
Book Club
eLearning & Distance Education

Online Training (OLT) Resources

- 1500+ online eLearning training courses
- Competencies in 10+ topic areas
- Harvard ManageMentor® curriculum for NPA management
- Webinars, both *Live* and *Recorded*
- AMA Certifications and other self-study certificate programs
- Request a SourceAmerica Academy account at: [www.sourceamerica.org/academy](http://www.sourceamerica.org/academy)
Online Curriculum

Curriculum Areas

• IT Helpdesk Certification (CompTIA A+ | MS Windows)
• Fundamentals of Lean for Business Organizations
• Managing Customer-Driven Process Improvement
• Quality/Organizational Excellence
• Practical Budgeting Skills for Business
• Women in Leadership
• Managing Organizational Change
• Problem Solving and Decision-Making Strategies
Online Courses

• Desktop Computer Skills
  – MS Office 2010 | 2013 – Basic and Advanced courses

• Certified Business Analysis Professional
  – (CBAP™) - BABOK® Guide V2.0 aligned

• Certified HRCI/PHR Professional
  – (HRCI / PHR – 2007 aligned)

• Project Management Essentials –
  – (PMBOK® Guide - Fourth Edition-aligned): All SourceAmerica Academy Project Management courses are recognized by PMI® and can be used in working towards first time, project management certification or to maintain credentials.
  – PMI-RMP® and PMI-SP® courses
Lending Library

Provides resources that support the staff and organizational needs of SourceAmerica AbilityOne Producing NPAs with AbilityOne contracts.
Lending Library

- Contains more than 300 training materials on DVD, and CD-ROM, 14 new featured items including new self-study certificate programs in Quality Improvement, Manufacturing, and Business Communications.
- Training manuals that support classroom-based activities
- Up to (3) DVDs, videos, and/or training manuals may be requested at one time, and items may be kept for 30 days
SourceAmerica produces webinars on a variety of topics

• Targeted to NPA or Federal audiences

• 55+ webinars (internal and external training and briefings) are scheduled in 2016. A few of the topics include:

  • NPA 101: An Introduction to AbilityOne and SourceAmerica
  • Disability Awareness
  • How to Recruit Wounded Warriors
  • Recruitment and Retention
  • Webinar series on Healthcare Environmental Services and Contact Center, Document Conversion, Grounds Maintenance Operations, and more.
Leaders book club are designed to:

• expand knowledge of senior managers and to develop new leaders
• Interactive monthly calls
• Two options:
  – Advanced leaders – focuses on organizational leadership (CEOs, executive directors and other upper level management)
  – Emerging leaders – focuses on issues of interest to the aspiring executive
How to pick which class or course to take?
SourceAmerica Training Resources

For more information on classroom and online training courses:

• Select courses from the SourceAmerica Academy
• Course information from the Monthly Training Postcards received by mail
• Monthly newsletters containing hot topics received electronically
• Monthly brochures received electronically regarding upcoming classes also posted on www.sourceamerica.org/academy
• 2016 SourceAmerica Training schedule includes:
• 90+ instructor-led courses.
• 4 new instructor-led classes on 4 topics
• Book Clubs for advanced and emerging leaders of NPAs
• The SourceAmerica Training Catalog is available at (www.sourceamerica.org/academy).
You can access all SourceAmerica training resources through the SourceAmerica Academy: 
www.sourceamerica.org/academy
SourceAmerica Training Resources

Using the SourceAmerica Academy you are able to:

- Enroll in Instructor Led classes
- Enroll in online courses
- Enroll in Webinars
- Access the Lending Library
You can search for all classroom and online classes in the SourceAmerica Academy by:

Clicking the *Search Course Catalog* tab on the log-in page and typing the course name you are interested in.

You can search for various training types.

---

**SourceAmerica Training Resources**

You can search for all classroom and online classes in the SourceAmerica Academy by:

Clicking the *Search Course Catalog* tab on the log-in page and typing the course name you are interested in.

You can search for various training types.

---

**SourceAmerica**

SourceAmerica Academy

Welcome to SourceAmerica Academy | Search Course Catalog | Contact Us | FAQ Page

### Search

- **All Types**
  - Courses
  - Instructor Led Classes
  - Featured

- **All Categories**
  - Instructor Led Training
  - Lending Library Item
  - Online Training Course
  - Self-Paced Learning Webinar

### Example Courses

1. **$10.10 Minimum Wage for Service Contractors - Recorded Webinar**
   - Type: User Defined Task
   - Course Count: 0
   - Subscription Term: N/A Days
   - U.S. Department of Labor recently published a final rule implementing Executive Order 13665, Establishing a Minimum Wage for Service Contractors. Learn more about the final rule and how it applies to AbilityOne.
   - Show details

2. **1 - Special Minimum Wages: Chapter 1: An Introduction to Department of Labor Investigations**
   - Type: User Defined Task
   - Course Count: 0
   - Duration: 11 minutes
   - Subscription Term: N/A Days
   - Show details

3. **2 - Special Minimum Wages: Chapter 2: Facility Tour and Documentation**
   - Type: User Defined Task
   - Course Count: 0
   - Duration: 9 minutes
   - Subscription Term: N/A Days
   - Show details

---

**2016 National Training and Achievement Conference**

WiFi is available to all attendees
SourceAmerica Training Resources

Find the class or course you wish to attend...

**Course Details:**

- **Course Name:** AbilityOne Academy
- **CEU:** 1.80
- **Duration:** 20
- **Delivery Method:** Instructor Led Training
- **Categories:** AbilityOne Compliance and Regulatory Basics, Products, Strategic Business Development (SBD)

Log-in to the Academy is required to register
...and by clicking the “Enroll Here” button, the system will take you directly to the enrollment page in SourceAmerica Academy.
With SourceAmerica Academy you can also plan professional development for yourself and for your staff.
Build a learning plan for long-term staff development

- Learning plans help track staff progress. You may also want to build a custom learning plan for your NPA that includes recommended training courses.

My Plan

| Goodwill Corporate University - Emerging Professionals Learning Plan Traditional |
| Date: 4/30/2013 |

Goodwill Corporate University is pleased to partner with the NISH Academy to offer a variety of e-learning and instructor-led courses that can help you achieve your professional and personal goals. The courses listed here are based on the Emerging Professionals educational track.

- Basic Business Math: Percentages and Ratios
- Basic Business Math: Averages and Equations
- Basic Business Math: Charts and Graphs
- Basic Business Math: Using Whole Numbers and Decimals
- Diversity on the Job: The Importance of Diversity and the Changing Workplace
- University on the Job: The Importance of Diversity and the Changing Workplace
- Business Grammar: Punctuation
- Business Grammar: Common Usage Errors
- Business Grammar: The Mechanics of Writing
- Business Grammar: Sentence Construction
- Office 2016 New Features

If you feel you are assigned to the wrong learning plan or need assistance, please contact Goodwill Corporate University at GCU@goodwillworks.org or call 479-475-4854.
A learning plan is a group of related courses, materials, tasks, and events accessed through SourceAmerica Academy which are automatically assigned to the NPA’s staff member(s) based on group or custom attributes.
SourceAmerica Training Resources

- Using learning plans, NPAs can assign individual tasks with due dates, completion requirements, and e-mail reminders for each student.
SourceAmerica Academy also offers Harvard ManageMentor®, special online content for NPA Executives, and Mid-to-Upper Management from Harvard Business Publishing.
SourceAmerica Training Resources

• Harvard ManageMentor provides access to action-oriented information on 44 key management topics, developed under the guidance of world-renowned experts, practitioners, and business leaders.
SourceAmerica Training Resources

• Each of the 44 topics contains research-based content and engaging resources and tools, along with new instruments, services and reporting capabilities to help organizations demonstrate the impact of the learning experience.
Training Incentive Voucher Program

- Implemented in 1997 as part of the SourceAmerica Financial Assistance Program for NPAs
  - to help our primary customer AbilityOne producing NPAs offset a portion of the travel costs associated with attending SourceAmerica training, and
  - as an incentive to increasing NPA participation in SourceAmerica trainings.
Eligibility

The Voucher Program applies to:

- **SourceAmerica, AbilityOne Producing NPAs***:

  A participating nonprofit agency that has been “authorized to produce” under the AbilityOne Program by the U.S. AbilityOne Commission; meaning the organization is producing products or providing services under an AbilityOne contract, as an incentive to increasing NPA participation in SourceAmerica trainings.

*Please Note: Only those SourceAmerica AbilityOne producing NPAs that are compliant with the Employment Research System (ERS) requirements are eligible for training incentive voucher reimbursement and/or AbilityOne Academy Scholarship Program.

For more information regarding ERS, visit the ERS website: http://www.instituteforempowerment.org/ers
Allocations

• Vouchers are allocated based on the generated disabled direct labor hours performed on an AbilityOne contract in the previous fiscal year and reported on the annual 404 Report submitted to the SourceAmerica Regulatory Assistance Department or the Summary Form 403 for NIB associated agencies.
Allocations

• Each eligible AbilityOne producing NPA receives five, eight, 12, or 15 vouchers valued at $200 each; based upon the following formulas.

- 1 and 29,999 disabled direct labor hours = 5 vouchers
- 30,000 and 49,999 disabled direct labor hours = 8 vouchers
- 50,000 and 99,999 disabled direct labor hours = 12 vouchers
- 100,000 or more disabled direct hours = 15 vouchers
Administration

- The SourceAmerica Accounting and Training Departments are responsible for the administration of the Program under the guidance of the Director, Training.

Note: All questions relating to the Voucher Program should be addressed to the Director, Training.
2016 and Beyond

SourceAmerica Training will:

• Conduct Training Needs Analysis (TNA) bi-annually (2016)
• Work closely with Business Development to offer more LOB specific training and introduce more certification-driven courses in 2016
• Provide more on-site training
• Expand eLearning and eLearning partnerships
• Help NPAs develop professional development Learning Plans
2016 and Beyond

SourceAmerica Training will:

• Expand the Lending Library offerings
• Provide the Book Clubs for executives of NPAs
• Increase the curriculum for On-site training
• Increase the line-of-business webinars
The SourceAmerica Training Team

Ana Rodriguez, Ed.D. arodriguez@sourceamerica.org
  Director of Training: Training department leadership; program needs assessment; curriculum strategic development; and on-site workshop and instructional solutions requests

Cora Chaply, cchaply@sourceamerica.org
  Training Manager: Distance and Online education programs, AbilityOne Academy, event and training evaluations, and statistical data

Jennifer “Jenna” Johnson, jejohnson@sourceamerica.org
  Instructional Designer: Design curricula, content, materials for instructor-led, self-directed, and eLearning courses, webinars, and documentation for procedures and systems

Lorna Pennewell, lpennewell@sourceamerica.org
  Training Logistics and Support Specialist: Lending library Administrator, ILT / Onsite Course & Instructor Support, and voucher program

Adriano Pianesi, apianesi@sourceamerica.org
  Training Program Manager, Trainer for SourceAmerica Business Applications (Customer Portal, FOA, etc.)

Sabrina Harmon, sharmon@sourceamerica.org
  Senior Training Program Manager: Trainer and special projects

Vacant
  Training Registration Specialist : LMS Administrator, Training, Event, and Conference registrations
Questions
Thank You

SourceAmerica