



Year-End Meeting 2022

Northwest Mountain Minority Supplier Development Council

December 8, 2022 | Tukwila, WA

Agenda

8:45 am | NWMMSDC Zoom Meeting Opens for Networking

9:00 am | Networking

9:30 am | Welcome:

- Fernando Martinez, President & CEO
- Angela Battle, Board Chairperson
- Shahzad Q. Qadri, MBEIC Chairperson
- Chi Pak & Stacie Harwood, T- Mobile
- Rocky Fong, JPMorgan Chase

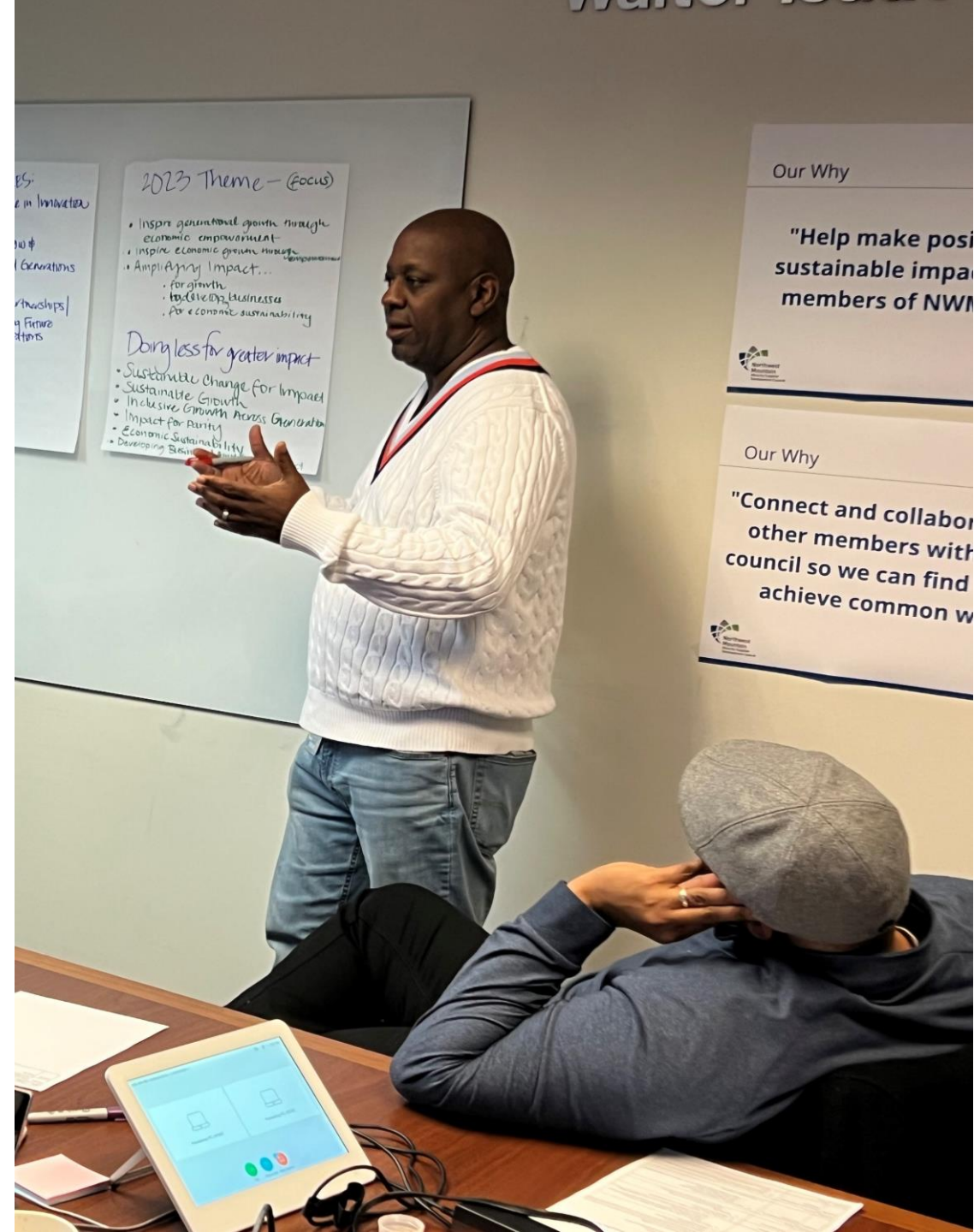
10:05 am | Year In Review & A Glimpse Into 2023

10:30 am | Questions & Answers

10:45 am | Program Concludes

10:45 am | Networking

12:00 pm | Adjourn



Angela Battle

Board Chairperson
Director of Subcontracting Diversity &
Development
Sellen Construction



Board of Directors

Angela Battle, Board Chairperson
Director of Subcontracting Diversity & Development
Sellen Construction

Carri Roman, Board Vice Chairperson
VP, Global Planning & Sourcing, Solutions & Enablement
Starbucks Coffee Company

Carl Gipson, Board Treasurer
Director, External Affairs
AT&T, Inc.

Kate Kleyman, Board Secretary
Vendor Diversity Program Manager
McKinstry

Shahzad Q. Qadri, MBEIC Chairperson
Partner
Wong Fleming, P.C.

Dicran Arnold, MBEIC Vice Chairperson
Global Enterprise Sales Area Vice President - Business
Development
World Wide Technology, Inc

Josh Canady, Board Member
Sr. Diversity Program Manager
Microsoft Corporation

Rocky Fong, Board Member
Vice President | Community Manager |
Community & Business Development
JPMorgan Chase

Clayton E. Judge III, Board Member
Global Procurement | Business Diversity & Inclusion
Nike Corporation

Chi Pak, Board Member
Director, Supplier Diversity
T-Mobile US, Inc.

Vladimir “Vlad” Poppel, Board Member
Supplier Diversity & Inclusion Program Manager
Intel Corporation

Fernando Martinez, Board Member
President & Chief Executive Officer
Northwest Mountain MSDC



Shahzad Q. Qadri

MBEIC Chairperson
Partner
Wong Fleming, P.C.



Minority Business Enterprise Input Committee

Shahzad Q. Qadri

Wong Fleming

Carmen Nazario

Elyon International, Inc.

Dicran Arnold

World Wide Technology, Inc.

Nelson Reyneri

Point B

Javier Chavez Jr.

Cerveza Zolupez Beer Co.

RC Sunkara

Mavensoft Technologies, LLC

T-Mobile™

A Special Thank You to Our Title Sponsor



A Special Thank You to Our Year End Meeting Sponsor

Rocky Fong, Community Manager, Seattle Market

Racial Equity Commitment

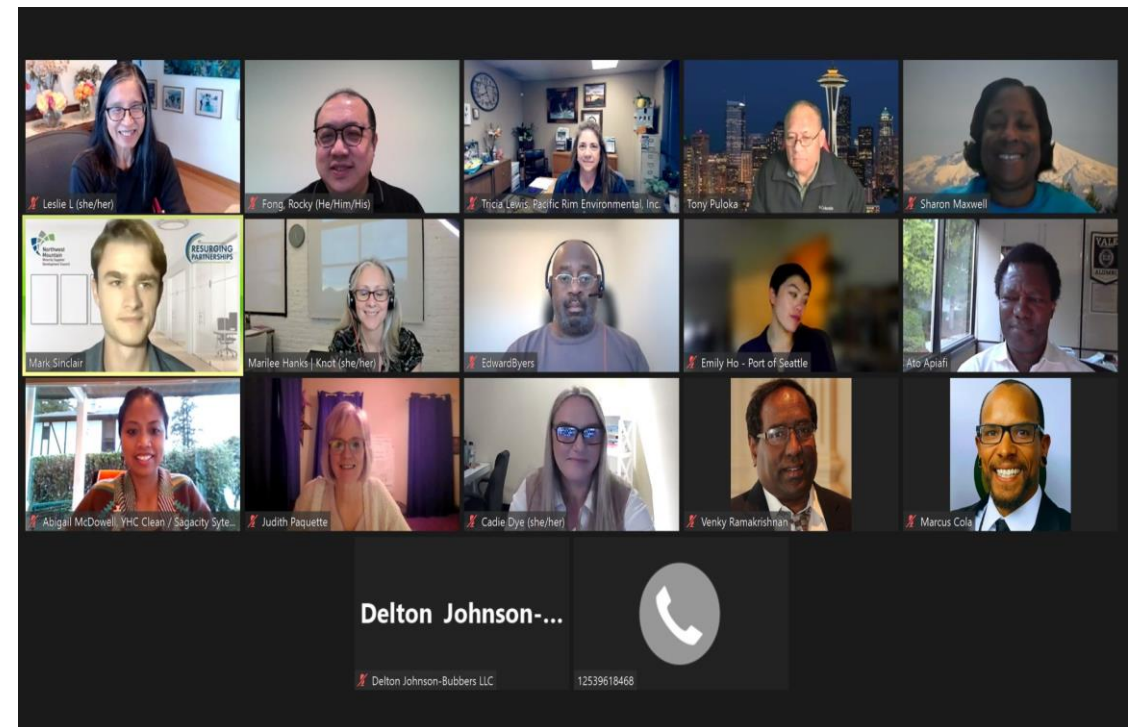
- At the end of 2020, JPMorgan Chase made a commitment of \$30 billion to help close the racial wealth gap. This is a business-led effort that spans everything the firm does, from promoting and Expanding Affordable Housing and Homeownership for Underserved Communities; to Improving Financial Health and Access to Banking in Black Hispanic and Latino Communities.
- Part of this commitment includes a commitment to spend an additional \$750 million with Black and Hispanic-owned businesses over five years—this is above and beyond what we spend currently.
- In 2021, we spent an additional \$155 million with 140 Black, Hispanic and Latino suppliers — more than doubling the first year spend goal and we are on a trajectory to exceed our 2022 spend goal as well.

Partnership Highlight

2022 NWMMSDC BUSINESS CONFERENCE



BUSINESS COHORT ACCELERATOR PROGRAM



Financial Health Curriculum

Chase delivers financial health content to the community by providing various workshops based on audience needs. These interactive workshops are scheduled one to two weeks apart for approximately 60 minutes of content and Q&A. Workshop modules will help participants develop their own financial roadmap during and after the workshop.

The following types of workshops are currently available:

Financial Health Basics

- Learn the importance of goal setting
- Create and manage a budget
- Strategies for saving money
- Credit and how it impacts financial well-being

Budgeting

- Monthly budgeting basics
- Understand fixed/variable expenses and income
- Create healthy spending and savings habits

Saving

- Build strong savings habits
- Learn the importance of paying yourself first
- Find tips and tools to support savings goals

Credit

- Discover what credit means
- Learn how to use credit wisely
- Track and manage your credit activities

Capital for Diverse Supply Chain Businesses

LISC Initiative sponsored by JPMorgan Chase and Co.



The Challenge

There's a need for greater diversity in the supply chain of many Fortune 1000 companies, but many diverse small business owners may not have access to the resources they need to expand capacity and build systems at scale. As a result, they cannot take on larger supplier contracts that can potentially advance their companies.

Launched in 2022, the LISC and JPMorgan Chase initiative is a no-cost unsecured financing program focusing on diverse owned businesses. The funds enable business owners to cover the costs of meeting the minimum requirements for doing business with large corporations, positioning them to compete for and win more procurement opportunities. The \$6+ million initiative will provide diverse small business owners with the tailored solutions, support and resources they need to compete, grow and create jobs.

JPMORGAN
CHASE & CO.

LISC

Our goals

This initiative will work to:

- 1 Address the longstanding gap in resources by offering growth capital and technical assistance to small business owners from diverse backgrounds.
- 2 Support the growth of diverse companies into larger, more sustainable operations, which spurs job creation and intergenerational wealth-building in underinvested communities.

What we're offering

Funding for diverse businesses ranging from \$25,000 to \$200,000 with flexible repayment terms.

- Those that receive funds and gain new contracts and business growth would repay this funding at no interest into a pool of funds to be awarded to the next wave of eligible diverse businesses.
- Those that apply the funds to eligible uses, but do not gain new contracts and business growth, can request to have the funding forgiven.
- Businesses that receive funds and use them outside of eligible parameters would be required to repay the funding at no interest.

Eligible uses: Small businesses may use these funds to meet the business requirements of prospective corporate clients. These uses include actions to address management systems, insurance, and compliance with supplier guidelines, such as:

- Technology cyber/ network remediation
- Operational control enhancements (i.e., disaster recovery/business continuity)
- Increases to insurance & bonding coverage (cyber, surety/performance, etc.)

Ineligible uses: These funds may not be used for fixed assets, payroll, or debt consolidation.



Who is eligible?

The LISC and JPMorgan Chase initiative is open to small businesses nationwide that are majority owned by people of color (including Black, Latino, Asian and Native American business owners). This program is open to businesses that are:

- Based in the United States, with annual revenues in or around \$5 million to \$10 million;
- In operation for more than five years, with an ability to deploy capital toward business improvement and growth;
- Minority owned and MBE Certified, or eligible for MBE certification;
- Facing barriers to pending procurement opportunities; and
- Other infrastructure or third party expenses related to securing new procurement contracts or performing against those contracts.

These eligibility requirements are guidelines. The initiative may consider companies that fall outside of these parameters if the funding use-case and pending contracting opportunities meet program goals.

Sole proprietors are not eligible for the program.

How can a diverse small business apply for this initiative?




Diverse small businesses may visit the [LISC website](#) to learn more about the initiative and to request information from a LISC staff member.



Become a Supplier to JPMorgan Chase

- Certified diverse businesses interested in pursuing an opportunity to sell products and services to the bank can start by registering in our Supplier Diversity network at jpmorganchase.com/supplierdiversity
- This is the first and most important step as the team searches this database to find diverse companies as opportunities come up.

Tier 1 & Tier 2

- Tier 1 diverse suppliers are companies the firm engages and pays directly for products and services. Tier 2 diverse suppliers are companies that the firm's Tier 1 suppliers engage and incorporate into their supply chains to fulfill projects for JPMorgan Chase and other clients. There are some purchases that JPMorgan Chase doesn't make directly because they are managed by an outside company. In those instances, suppliers may be introduced to our Tier 1 suppliers for business opportunities.
- 

Thank you.

Ready to get started, or want to learn more?

Please contact:

Rocky Fong

Vice President / Community Manager - Seattle Market

rocky.fong@chase.com

206-818-6018

For informational/educational purposes only.

The presenter's views may differ from other employees and departments of JPMorgan Chase & Co. Views and strategies described may not be appropriate for everyone, and are not intended as specific advice/recommendations for any individual. You should carefully consider your needs and objectives before making any decisions, and consult the appropriate professional(s). Outlooks and past performance are not guarantees of future results.

Deposit products provided by JPMorgan Chase Bank, N.A. Member FDIC
© 2022 JPMorgan Chase & Co.



**Thank You to Our
Annual Sponsors**

Platinum Sponsors



Mike Nakamura
photography



Gold Sponsors



Silver Sponsor



AT&T

Bronze Sponsors



Emerging Sponsors





 NW Mtn Minority Supplier Development Council

RESURGING PARTNERSHIPS

Empowering Future Generations | 2022



Build Economic Value for Communities of Color, Create Generational Wealth & Abolish Generational Poverty



6
WHY

Foster An Environment That Creates Opportunity and Builds Economic Value.



7
WHAT

CERTIFY: Validates Ethnic Minority Ownership Business Entity.

DEVELOP: Enhance Ethnic Minority Business Competencies through Educational Programming.

CONNECT: Leverage Network of Members & MBEs with the intention to Engage in Business.

ADVOCATE: Actively Educate & Promote Minority Business Value to all Stakeholders.



5
HOW



EXTERNAL
APPROACH



2
WHERE

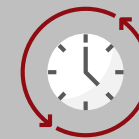
Northwest Mountain MSDC
Region | National & International
Alaska, Idaho, Montana, Oregon,
Utah, Washington, Wyoming

4
WHO



Stakeholders:
Public Agency Sector, Corporate Members,
MBEs, NMSDC, Regional Councils, Community,
Council Team Members

3
WHEN



24 Hours
7 Days a Week
365 Days a Year

Build Economic Value for Communities of Color, Create Generational Wealth & Abolish Generational Poverty



6
WHY

Foster An Environment That Creates Opportunity and Builds Economic Value.



7
WHAT

• **Build Programs Around 4-Key Foundational Pillars**

- Certify | Develop | Connect | Advocate

• **Align Council Performance Through Annual Playbook Development**

- Why do we Exist?
- How do we Behave?
- What do we Do?
- How will we Succeed?
- What is Important Right Now?

• **Perform & Measure Performance Against 5-Key Dimensions**

- Financial | Operational | Marketing | Customer Driven | Learning & Development



5
HOW



2
WHERE

Northwest Mountain MSDC
Region | National & International
Alaska, Idaho, Montana, Oregon,
Utah, Washington, Wyoming

4
WHO



3
WHEN



24 Hours
7 Days a Week
365 Days a Year

Stakeholders:

Public Agency Sector, Corporate Members, MBEs, NMSDC, Regional Councils, Community, Council Team Members

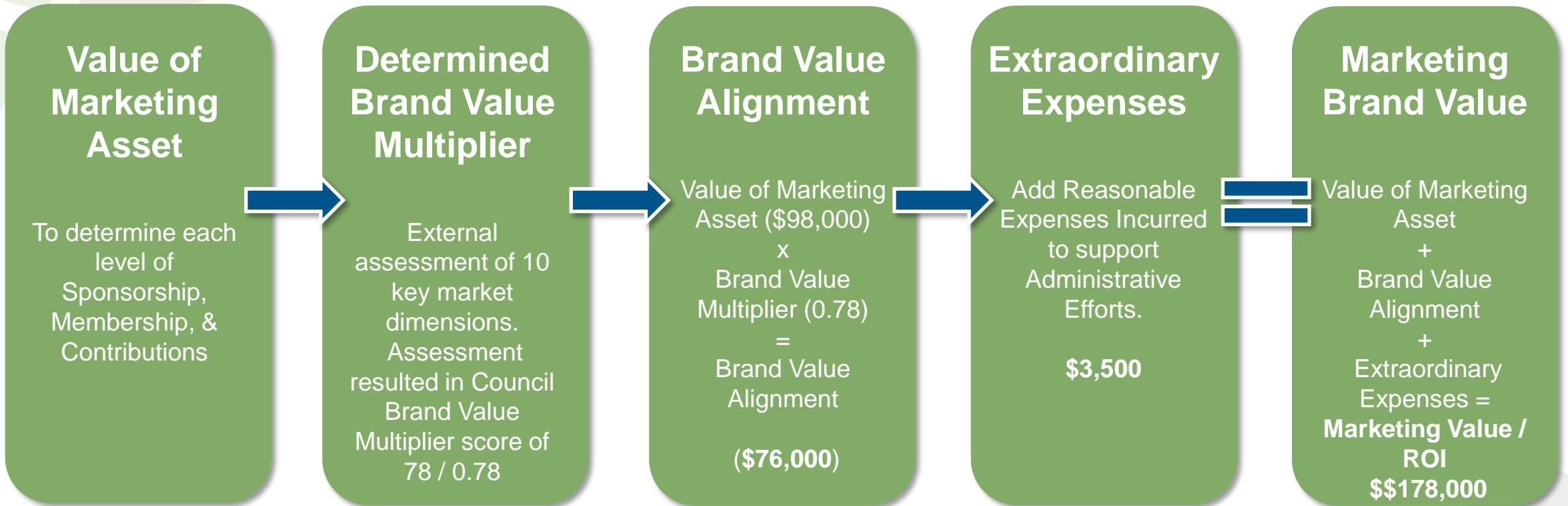


MARKETING VALUATION SUMMARY

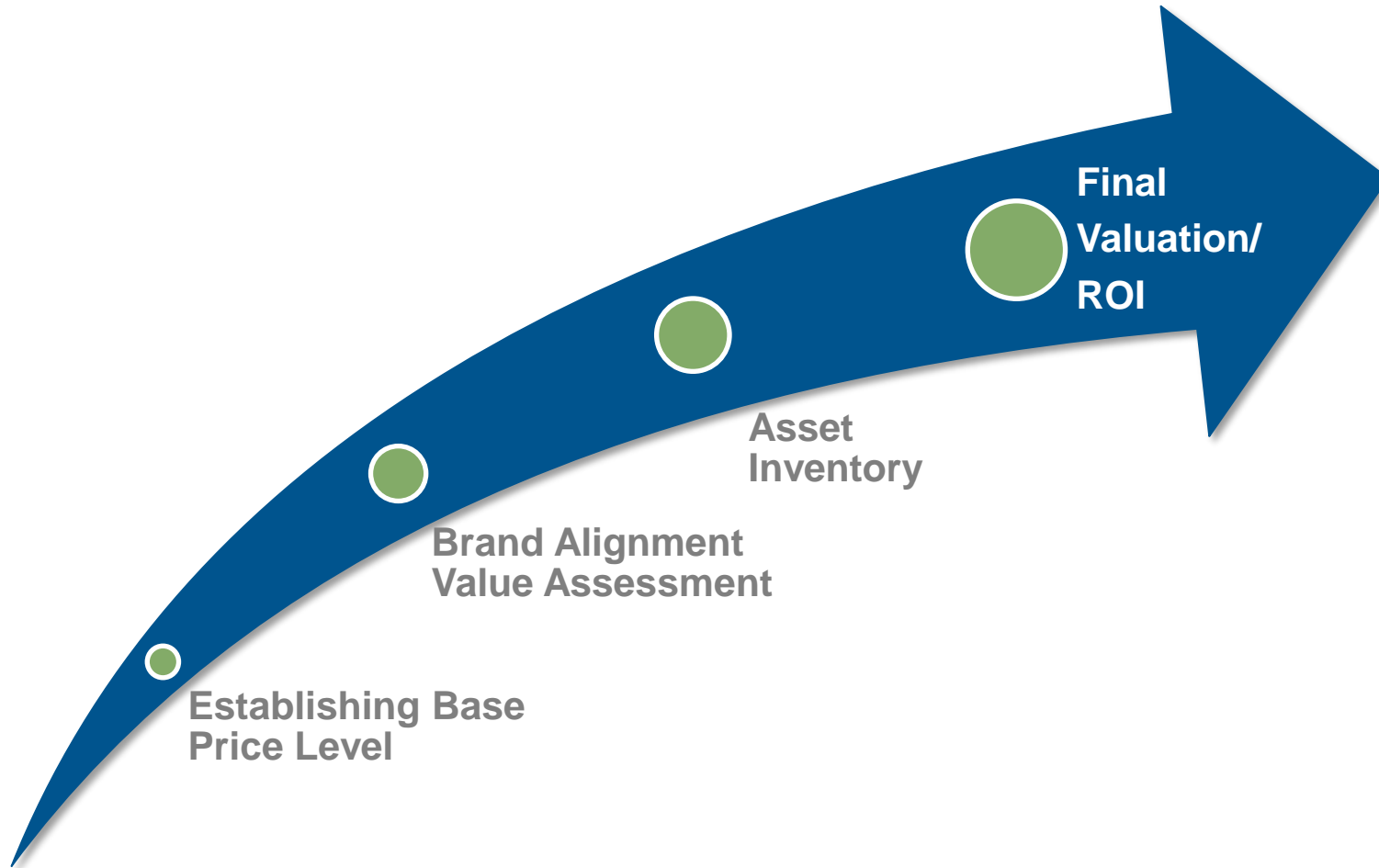
Northwest Mountain Minority Supplier Development Council

December 7, 2022

5 STEP PROCESS - ROI ASSESSMENT

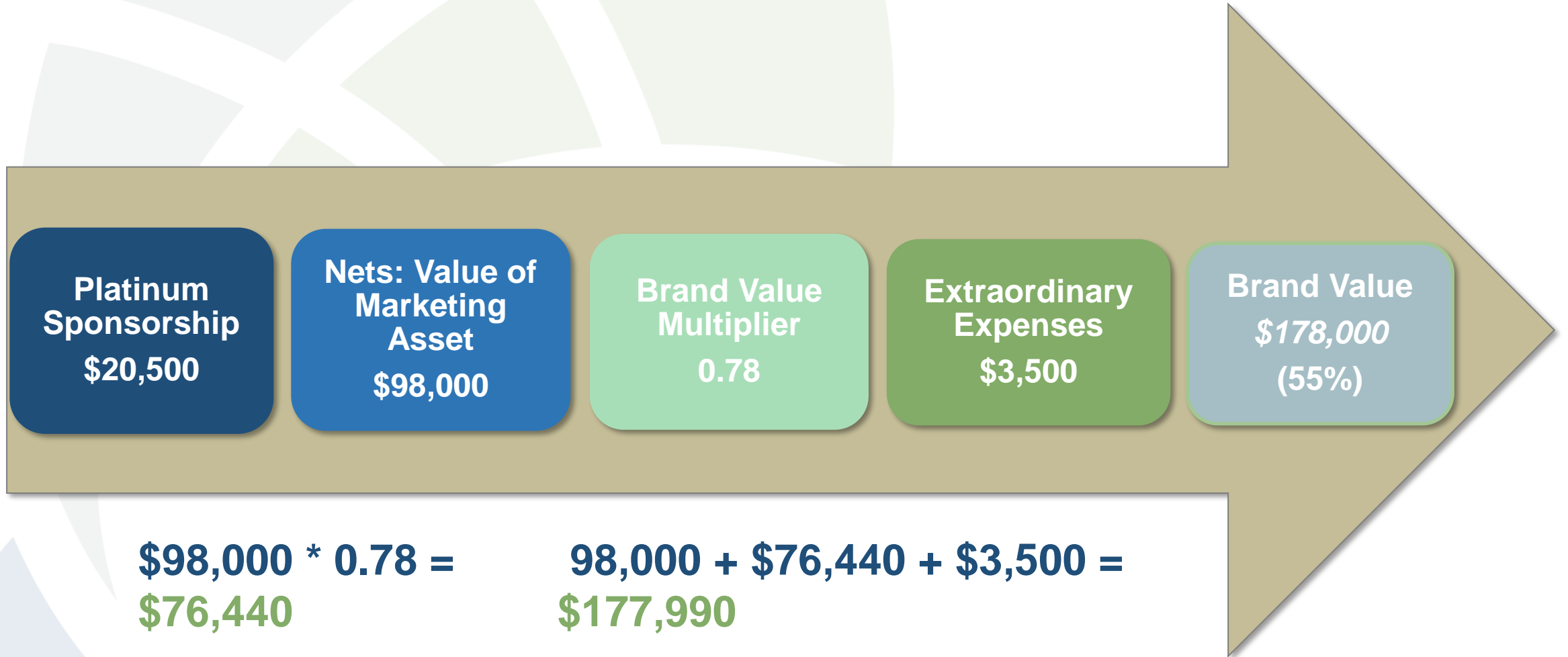


STEPS FOR MARKETING VALUATION



The Strength of the Rights-Holder Brand: 8
Awareness: 9
Level of Audience Interest/Loyalty?: 7
Ability/Assistance to Activate: 8
Level of Exclusivity Offered to Sponsor: 9
Business Opportunities: 8
Media Coverage Potential for Sponsor: 5
Customized promotional concept or "BIG IDEA": 7
Established Track Record with Sponsors: 8
Social Good, Community Impact Opportunities: 9

BRAND VALUATION MODEL



$\$98,000 * 0.78 =$
 $\$76,440$

$98,000 + \$76,440 + \$3,500 =$
 $\$177,990$

MARKETING VALUATION SUMMARY

The following numerical data provides insight into the Council's "**maximum sponsorship potential**". The Council's marketing asset value plus other attributes, depict return on investment upon the Council's sponsorship and investment opportunities. This information shows that the more money you invest, the higher your return value will be. Using industry standard data, the Council developed a model in which we assessed and determined an ROI leveraging our sponsorship tiers.

To assess the Return-on-Investment (ROI) we designed a **5-step process**.

- ✓ The Council determines the **Value of each Marketing Asset (*Price of Marketing Asset in the Marketplace*)** attributed to each level of Sponsorship, Membership, and Contributions.
- ✓ The Council determined its **Brand Value Multiplier (*Factor that amplifies the base Value of Council Sponsorship*)** by completing an external assessment of 10 key market dimensions. The assessment resulted in a Council Brand Value Multiplier score of 78 or 0.78.
- ✓ Multiply the Value of each Marketing Asset by the Brand Value Multiplier resulting in the Council **Brand Value Alignment**.
- ✓ Add in the Extraordinary Expenses (***Reasonable Expenses Incurred to Support Administrative Efforts***).
- ✓ Final step in the process is to aggregate all Value Marketing dimensions and determine **Marketing Brand Value:**
Value of each Marketing Asset + Brand Value Alignment + Extraordinary Expenses = Marketing Value/ROI

Example: \$20,500 Sponsorship
Nets: \$98,000 Value of Marketing Asset
Multiply by Brand Value Multiplier: $\$98,000 \times .78 = \$76,440$
Add Extraordinary Expenses: \$3,500
Total: $\$98,000 + \$76,440 + \$3,500 = \mathbf{\$177,940}$ in Marketing Brand Value

The Council brand assessed in a very conservative manner. Conservatively Council Sponsors, Members, MBEs, and Contributors net a **55 %** Marketing Brand Value/ROI through alignment to the Council and peer Sponsors, Members, MBEs, and Contributors.

Impact in 2023

BOARD OF DIRECTORS & TEAM MOONSHOT

- **Moonshot goal is to...**
 - Build economic value for communities of color
 - Create sustainable generational wealth
 - Abolish generational poverty
- In 2023 we are committed to *amplifying impact* by...
 - **Engage | Connect & Certify** our MBEs
 - **Share | Advocate** for our MBEs and corporate partners - sharing stories of value, innovation, and impact
 - **Grow | Develop** our MBEs, corporate partners, and Council team

Impact in 2023 & Beyond

BOARD OF DIRECTORS & TEAM MOONSHOT

- **By 2025 we hope to...**
 - **Launch** a compelling communication campaign that tells our story of impact and amplifies the value of MBEs
 - Local stories
 - Member highlights of impact and the role of the Council in developing their business
 - **Conduct Market Analysis** to determine service delivery in all seven states and develop market service plans
 - Be recognized as **thought leaders** connecting and educating MBEs and corporate members
 - **Develop** competency & grow MBE Certifications
 - **Recruit** and grow corporate membership and engage them in becoming catalysts to advance the Council mission

Thank You!

