A Request for Proposal – New England Regional Defense Supplier Network Readiness Facilitation

Prepared for:

Vermont Agency of Commerce and Community Development Department of Economic Development

Paul Williams

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Submitted by

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July 9, 2020

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Cover Letter

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Vermont Agency of Commerce and Community Development
Department of Economic Development
Attn: Paul Williams, Grant Management Specialist
1 National Life Dr, Deane C. Davis Bldg., 6th Floor
Montpelier, VT 05620-0501

Subject: Bid Proposal – Defense Supplier Network

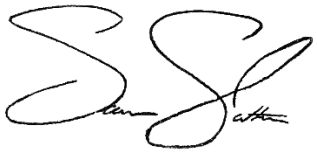
Dear Mr. Williams:

LSI is pleased to provide the following proposal in response to the New England Regional Defense Supplier Network Readiness Facilitation RFP. We are quite familiar with NERDIC having worked within its ranks, and we would be delighted to support this exceptional program.

If you have any questions regarding this proposal or are in need of additional details, please contact Dawn Wivell, Vice President of Business Development, via the following: office: (603) 205-1001; email dwivell@lsiwins.com. Or, feel free to contact me directly: office: (801) 776-0062; email sslatter@lsiwins.com.

We look forward to the opportunity to work with your group on this project, which is going to be tremendous for the New England economy.

Sincerely,



Sean Slatter
President, CEO

1.0 Required Elements

This following elements will serve to address the *Required Elements* as listed in 2.5 of the RFP. For expediency purposes, we will address only those elements that are not already covered by answers to the required questions in 4.2 of the RFP, which you will find in section 3.1.2.

1.1 "Think-Tank" Dimensions

1.1.1 Regional collaboration

Creating an intentional focus on region-wide collaborative efforts. Agencies reach across state boundaries seeking larger scale of collaboration. This encourages industry collaboration, both across sectors and within supply chains.

1.1.2 Multi-disciplinary approach

There is deliberate investment in developing an integrated multi-disciplinary approach to industry technical solutions. Resources are shared between technical clusters, and issues are explored in a systems-wide approach.

LSI has considerable experience in establishing, developing and managing multi-state and multi-player collaborative efforts throughout the United States and overseas and in a multitude of cultures. These include States, Regions, First Nation Tribes, Demographic specific groups, and Industry specific groups. In addition, we are passionate about ecosystems and have established and managed ecosystems whose primary focus is shared economic development benefits and which establish a system of integrated multi-disciplinary approaches and shared resources.

1.2 Convene existing players

Please refer to the responses to various questions in section 4 and the work plan.

1.3 Industry 4.0 Preparedness

This flow chart demonstrates the model we envision:

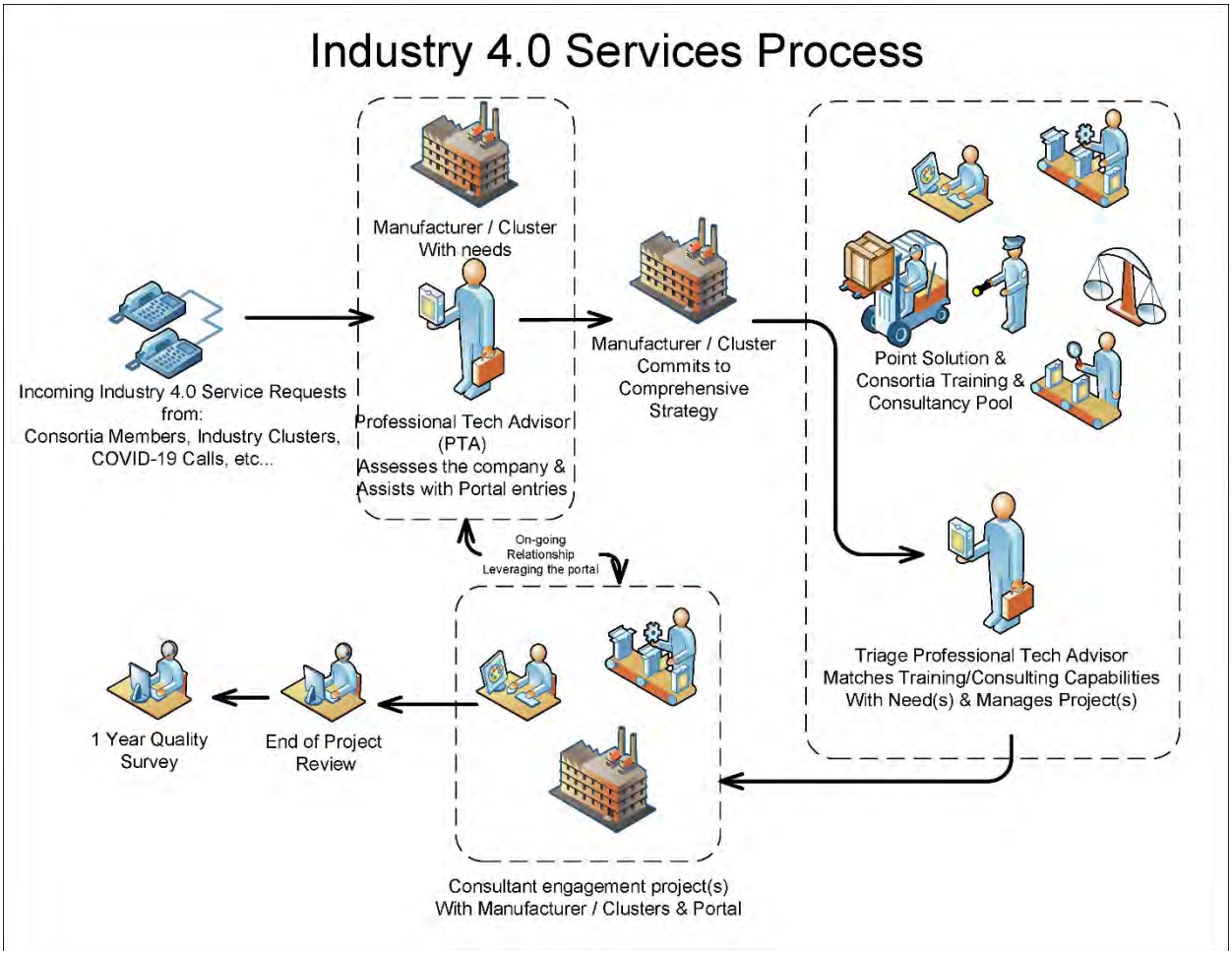


Figure 1: Sample Model

With no budget to work against, we are offering what we feel is substantive training and support, and which can be modified. This type of training and hands-on assessment and planning will also provide for the bulk of what you are looking for in a technical advisor. These programs are done virtually so we can deal with the current need for social distancing, they can be cost effective and at the same time provide a very comprehensive and customized approach for the participants. They are offered often enough so that a group of technical advisors are available every week. If we are awarded this project, we would work with you to ascertain what the budget can bear, what is most important, and what serves to achieve the goals of the first year of the program. These are all priced in the budget section and can be selected, or not, based on available funds.

We would like to point out that we believe that some of these programs should be offered to companies on a cost sharing basis if you are so inclined.

We are prepared to offer comprehensive and highly utilitarian educational and informational events and can easily pare down for simpler modules or provide a full fledged master class and record it for inclusion in the portal. Any of these can be offered or be curated to be offered vis-à-vis partners such as

MEP, PTAC and so forth. This is actually an excellent idea and obviously serves to promulgate the entirety of the effort. The offerings we have in mind are as follows:

- Consortia style training on Industry 4.0 readiness
  - 6 hour virtual class with breaks @ $2,200 per session. We can do one session per week for a maximum of 50 classes in a year = $110,000 maximum.
  - In addition to the course, we suggest that companies in need of technical advice, utilize this event for help whenever it comes up. It is expeditious inasmuch as one would have access to more than one expert. We also like the idea that problems and questions and solutions can be shared with other participants.
- Consortia style assessment following the Industry 4.0 readiness training
  - 6 – 8 hour virtual session with breaks. $2,800. We have the capability of doing 5 sessions per month or 60 per year = $168,000 maximum. Each participant is provided an assessment and a comprehensive plan.
- Follow-on consulting resulting from the comprehensive plan developed during the assessment
  - On site capacity recovery or utilization and capacity building. $1,500 per day for +/- 10 days. This is a program that we believe the company should share in the cost @ a minimum of 50% if not the entire cost. The number of total projects during the year is limited to about 5 given the comprehensive nature of the service = $75,000 maximum. It is further suggested that these can serve as pilots and/or case studies.
- Professional Technical Advisor (PTA)
  - A PTA is available for follow on project management work and is primarily noted herein as dedicated to following up on the on-site capacity building work. $350/hour for an average of 10 hours per project = $3500 per project maximum. If this is applied to 5 pilot projects, the maximum total would be $17,500.
  - The PTA can be made available for other projects and/or companies

1.4 Identify and share best practice across ecosystem

Please refer to the responses to various questions in section 4 and the work plan, with the exception of the following:

We have come up with a few ideas for pilot projects as recommended. It is highly likely that ultimately, the three + pilot projects will be completely different from what we might have imagined, but we thought we would share these thoughts. We were unsure as to whether or not we were required to include this in the budget, but have added a loosely projected line item just in case. It is somewhat difficult to price this element until such time as it is being planned.

- **Artificial Intelligence Discovery and Tracking of Advanced Manufacturing Market Themes and Trends Pilot Program**

Purpose: to provide advanced manufacturing market intelligence to SME's so they can strategically react to emerging market, product and customer opportunities.

LSI is partnering with a small New England based industry 4.0 company that has customers like Apple, Microsoft, BP, Siemens, Qualcomm and more, to bring information to SME's and Primes from big data that is structured and purposeful.

They use Artificial Intelligence and Theme Radars to detect meaningful themes for their audience. Examples of the type of information that might be discovered could be similar to the following:The Hydrogen Transportation Economy will require new low temperature conduit systems, Autonomous cars require new sensors, Cloud intelligence will move to the edges of cloud networks etc.

They can deliver actionable insights to their customer. This information would be accessible in the NERDIC portal. We believe that a service like this would add value to the portal which in turn could validate a portal membership fee and help with sustainability.

We believe that this Pilot Program meets NERDIC's goal for small and medium defense SME's to learn about emerging manufacturing technologies and needs. As stated in your proposal, the Regional Defense Industry Portal should function as a platform for information that highlights emergent trends.

Cost: $23,000 for 1 year

- **Military Supply Chain** - Coordinate a military supply chain session with various partners focused on military supply chain issues, counterfeit parts, cybersecurity requirements, the transition of military specifications to SAE specifications, and a review of product assurance design and manufacturing test, for product delivery to military commands.

  Cost: TBD

- **Commercialize the Portal** - Work with partners to run a pilot on various scenarios whereby the portal provides value tantamount to being it's own commercial center. This would help with determining the development of the portal and save time and missteps.

  Cost: TBD – could be a university project at the graduate level

- **Industry 4.0 Prime-Supplier Knowledge Exchange** - This pilot would be created for Prime Contractors that have newly defined Industry 4.0 Supplier needs. Once the portal is functional, a Tech Advisor will facilitate a two-hour knowledge exchange between the Prime Contractor and up to fifty suppliers at a designated site close to the Prime, or if the Prime prefers, they can host the event at their own facility.

  The Prime will provide detailed information to the Tech Advisor about their Industry 4.0 Supplier needs and then the Tech Advisor will use the portal to identify up to fifty suppliers with capabilities that closely match the Prime's needs. The prime will educate the suppliers on what they need and then open up for Q & A.

Once the Exchange is over, the Suppliers will be invited to stay on for a short Round Table Discussion facilitated by the Tech Advisor on Industry 4.0 compliance.

Cost: TBD

1.5 Regional Defense Industry Portal

In addition to functioning as a unifying platform for information that highlights emergent trends, data, and valuable resources, we envision a portal that provides the following functionality:

Portal interface and use by the manufacturers:

The portal will be where the manufactures provide all their information so that they can be discovered by potential clients and customers. The information they would list, includes but is not limited to:

- Catalogue of equipment and process capabilities
- Certifications and achievements (AS9100, ISO 9001, NADCAP, etc.)
- Available capacity for each capability
- All other qualifying requirements (GSA Schedule, Cage Code, DUNS number, etc.)
- NAICS Codes

Manufacturers would also use the portal to identify other companies, with desired capabilities, to team with on certain RFPs or innovations to bring to market.

If there is a secure firewall for each manufacturer, the portal can be where all of their Internet of Things data can be stored and analyzed. Data items that would be used to predict downtime – temperatures of motors and gear boxes, electrical load meters, airflow in cooling systems, vibration sensor readings, production yield, line speed, etc. This information can be used for decision making on scheduling maintenance activities between production runs.

Portal interface and use by Purchasers:

The portal will be the place where purchasers go to find producers with specific capabilities and capacity for taking on work. The portal will have to be sortable by a number of attributes including but not limited to:

- Equipment and capabilities
- Certifications and achievements
- Vendor score from previous activities
- Prime or subcontractor preferences
- Location(s) of the capabilities
- NAICS Codes

Portal interface and use by Professional Tech Advisor:

Not all purchasers will have the capability to review a product specification and know what technologies are needed or could be used to produce the product. The Professional Tech Advisor (PTA) would be expected to look at the specification and gain an understanding of how those products were built in the past and consider if there are new and improved methods to do the work now. The minimum expectation would be for the PTA to question the current process and to look into the portal and see if there are innovative companies who would like to brainstorm alternate methods to produce the product and if there are good technical and cost reasons to change the method.

The PTA may decide the best way to produce the product is to utilize the capabilities of several of the producers in the portal. The PTA would create a consortia to process the product leveraging the best technologies and capabilities of each member of the consortia.

We are putting a first-year cost of $500,000 on the portal. If that exceeds your budgetary capacity, we will move back to a more phased in approach.

Note: It is difficult to know how much can extracted or built upon from RADE. In the majority of cases, designers would opt out of building a system on top of another, particularly one that is somewhat old. Obviously, the information contained in RADE can be very useful, although it will need to be updated. It is the platform we are concerned with. We would make every effort to cut costs by using RADE where possible and if possible.

1.6 Institutionalized Solution

Please refer to the responses to various questions in section 4 and the work plan

2.0 Pricing

Please see the Attached Price Schedule Proposal.

LSI has done its best to price the requested services, projects, programs, etc. based on numbers that are neither extravagant nor extraordinarily thrifty. Since there was no budget to base these programs on, we ask that you feel free to propose a reduction or an increase in accordance with the available resources. For example, if the cost of training is too high, we can reduce the number of sessions. If the cost of the portal is too high, we can segment out the design and development in accordance with budgetary constraints. If what we are proposing is more indepth than you had planned on, we can pivot. Conversely, we can also provide for increases that make sense. We have added the costs of certain things that may not need to be paid for; ie pilot programs, whether or not you want a full business plan for sustainment or just suggestions, etc. As a result, we have provided a pricing proposal that may not reflect your expectations. As such, we are expecting that you will want to discuss adjustments. Moreover, we will most likely have to adjust based on the status of the CoronaVirus in New England.

3.0 Team

3.1 Members

Who are the members of bidding consortium or entity that would be working directly on project, and what is their direct experience.

LSI has a teaming agreement with Optimize llc and we are presenting ourselves as such. LSI is the lead bidder and is incorporating the expertise of Optimize, particularly in the Industry 4.0 readiness educational and support services area. LSI is headquartered in Utah, with offices around the world, including one in Portsmouth, NH. Optimize is located in Windham, Maine.

LSI

LSI Business Development (LSI)-an affiliate of Logistic Specialties, Inc. is a successful corporation that understands the importance and value in community support and collaborative agreements. Incorporated in 1974, LSI has over 47 years of experience in providing business development. LSI's core competency is in providing the entire spectrum of business development and economic development services to our clients. LSI's clients range from the start-up entrepreneur and innovator to the multi-billion dollar publicly held company and from states, regional entities, and federal agencies, to universities, associations, and sector consortia. We are passionate about helping our clients win new business and become more competitive, and passionate and about growing the economic base and creating jobs in the communities in which we work.

Our focus is to win new business for our clients and increase the tax base of local communities. We do this by assisting clients, both public and private, through the entire business development process. For over 47 years, LSI has assisted hundreds of companies, directly and through our economic development programs, in winning new business; on average $100 Billion per year.

We base our success on hiring the most qualified account managers and giving them the responsibility to manage all aspects of the program effectively. In addition to effective account management, LSI is deeply focused on ensuring excellent working relationships with our customer base and making customer satisfaction our highest priority.

LSI has a long history of supporting the Department of Defense (DOD) and combining this relationship with our community involvement which has led to LSI's management of several collaborative programs beginning in early 2006. We have since managed multiple collaborative agreements throughout the United States and Eastern Canada. These programs link together industry, academia, research organizations and government at the local, state and federal levels to solve problems within various areas of the DOD. Together, these collaborative programs include over 1000 member companies, universities and government representatives. These collaborative agreements have exponentially increased our network of research and academia partners throughout the country.

Optimize

Optimize, Incorporated is an Industrial Engineering support and service provider. As lean Six Sigma practitioners, we apply lean SS concepts in our design, project management, and implementation services. We utilize a variety of continuous improvement solutions to generate economic impact and

gain competitive advantage for client companies. Programs & Projects generate momentum for positive change so clients can realize the performance improvements desired.

Industries:

- Manufacturing
- Services
- Government Health care
- Construction

Projects:

- Innovation & Collaboration
- Industry 4.0
- Lean
- Six Sigma
- Inventory Management

Programs:

- Enterprise Transformation
- Supplier Development
- Supply Chain Integration
- Innovation

Services:

- Industrial Engineering
- Innovation Collaboration Workshops
- Consulting & Training
- Program & Project Management

Solutions:

- Assessment Benchmark
- Awareness Training
- Planning
- Implementation
- Measurement / Data collection

Working Region:

- All 50 states and Puerto Rico
- See experience and expertise below

Experience and Expertise:

The optimize network has over 150 years of service industry, manufacturing and design experience across several industry sectors including electro-mechanical telecom safety devices, packaging, shipbuilding, secondary wood products, aerospace and automotive products. As a nationally recognized Lean Six Sigma Facilitators/practitioners we has delivered Lean Six Sigma facilitation services in all four public Naval shipyards, NAVSEA, NAVAIR, and the U.S. Air Force as well as both of the largest Private Navy Shipbuilding Primes and the world's second largest Aerospace Prime.

Our background includes experience with the Toyota Production Systems, Lean, Six Sigma, Theory of Constraints, management of multi-million-dollar contracts, and supply chain development. As an inventors and innovators, we have designed and patented several consumer and commercial products in use today.

We are change agents able to work well with all levels of employees. We combine our facilitation and product development skills to provide a structured approach to collaboration, innovation and process improvement to our clients.

Industry 4.0 Example with the four Naval Shipyards:

Multi state collaboration – Kittery, Maine, Norfolk, Virginia, Washington, DC (NAVSEA HQ), Puget Sound, Washington, and Pearl Harbor, Hawaii

MRO and production Material and inventory control – 2006 - 2010

In the re-fit and refurbish of nuclear submarines, all repair work must be certified "sub-safe" If the documentation of the work becomes missing, the shipyard has no choice but to repeat the task and recertify. The industry 4.0 solution was to attach RFID tags to all of the work certification packages, and to install "last place read" antennas through out the shipyards. This way, we could narrow down the search area for the work packages thus eliminating the recertification, rework loop.

The same project utilized point of use vending machines integrated with worker identification badges. The badges contained enough information about the qualification certifications (quals) for each worker. Based upon the worker's department (or code) and their quals, they were allowed access to the point of use vending machines. Some of the vended materials was connected to specific jobs/work packages, so a secondary step of scanning the work package was required to release the material. All of this information was fed directly back to the project management team.

Measure of success:

All submarine refit and refurbish projects in all four naval shipyards now utilize the RFID tags on their work packages, and all Projects have adopted the point of use vending. The aircraft carrier projects have also adopted both systems.

Industry 4.0 example at a commercial business:

Multi state collaboration: Cincinnati, Ohio, Chicago Illinois, Homerville, Georgia, Memphis, Tennessee, Leominster, Massachusetts, Valparaiso, Indiana, and York Pennsylvania

Overall Equipment Effectiveness – 2013 - 2016

There are only a handful of companies that produce all of the paint related cans in the US. Optimize worked with the second largest producer of paint containers to assist 7 of their locations. These plants rely heavily on the highspeed processing equipment to meet their demand. There is no new technology on how the cans are made, the process hasn't changed in more than 50 years. When in an environment where the equipment does all of the value-added steps, such as forming and assembling steel cans, the up-time of the continuous line is critical. Our project started with applying the repairs necessary to return the machines to optimum performance, then adding sensors on critical components that collected data like temperature, vibration, airflow, etc.

The data collected was analyzed to produce a predictive schedule for downtime with an eye toward eliminating unscheduled downtime and emergent maintenance and repair.

3.1.1 Key Personnel

Resumes of Key personnel are located in the Resumes sections of this proposal.

3.1.2 Indication of how they would:

3.1.2.1 Engage key ecosystem members from across the region

Members of the LSI-led consortium for this engagement are well versed in ecosystem development on both geographic and industry specific levels; on state, regional, and multi-state levels – nationally and internationally. Members of our team have led region wide collaborative efforts in New England in

various sectors including defense, as well as project or results driven initiatives in areas related to economic development. The process of engaging and convening existing players and stakeholders across the New England region in the defense sector is quite straightforward. In addition, it is extremely helpful that the NERDIC members each have extraordinary access to information in each of their states.

It is of the utmost importance that as this project is undertaken, the information is disseminated as widely and deeply as possible. We envision the sequence of events to engage the key ecosystem members across the region as follows:

1. Gather and combine existing databases and formulate the initial basic communication mechanism. Get early buy-in from as many key partners and stakeholders as possible. By establishing this immediate support, we would expect to create a network that can provide for a substantive data base and a well distributed system for supportive and reinforcing communication.
2. Establish compelling messaging to inform the industry of the program; its goals, objectives, benefits and specific upcoming actions. Provide for a way for them to engage immediately.
3. Convene the players and stakeholders at an initial conference to relay what the full scope of this initiative entails. In an ideal world, this would be a great opportunity for the industry to meet up and engage and to begin the process of setting the stage for collaboration and instilling the sense of what a functional ecosystem is and driving home the concept of collective intelligence. However, due to the pandemic, it is more than likely that the convening will have to take place virtually. As a result, it may need to happen in stages, beginning with the detailed overview of the project in its entirety and then moving to smaller groups to provide for interaction, which is really important. We would recommend that the smaller groups be allocated by date and time up to a maximum number for each and not by state to start moving away from state identity and towards a regional one. We would hold as many as are necessary to accommodate all those who wish to participate. This initial effort should place over a period of 6 weeks.
4. During the process of informing, engaging, and convening the industry stakeholders at large, the team will be documenting and mapping assets, gaps, innovative programs, industry initiatives, partnerships and existing collaborations to provide in report form and to establish the foundational springboard for the ecosystem. This process should take about 1 month.

3.1.2.2 How they would decide and distribute demonstration sites across region, especially how they would approach typically more under-resourced and underserved States such as VT. NH, ME

During the information gathering and asset mapping process, the team will identify existing demonstration sites, if any, potential demonstration sites and work with the steering committee to ensure that we have uncovered all possibilities. All states, including the more under-served states have university campuses that are involved in some aspect of industry 4.0 or the defense industry and should provide for a great demonstration site option. In addition, all states have company campuses that can provide sites. This process will move to create demonstration sites that focus on very specific technologies, with the goal of providing for all applicable technology demonstration options throughout the region.

3.1.2.3 Bring in best practice and innovative technology to demonstration sites

The very process of developing the ecosystem provides for a mapping and inventory of assets inclusive of best practices and innovative technologies. The very essence of developing the foundation of said

ecosystem requires the development of relationships, motivating collaboration, and establishing a concrete understanding of the benefits and necessity of committing and contributing. This translates into motivating the provision of such things as best practices and innovative technologies to demonstration programs and sites.

3.1.2.4 What key technologies of Industry 4.0 would they recommend the focus be on (ie AI, robotics, cyber etc)

Subject to change once the real work is underway, we would suggest a focus on:

- **Big Data** is incredibly important for a number of reasons, not the least of which include addressing the aspects of feeding the demand side, developing products and technologies, growing resources, used as a commodity and a business in and of itself to ultimately help in sustaining the ecosystem and it's continued growth and utility. The creation of a portal provides for an exceptional opportunity to collect, utilize and deploy big data in a number of ways such as identifying which potential suppliers has excess capacity of a specific manufacturing process. Will help us create a manufacturing by consortia model with the potential for several manufacturers contributing parts of the manufacturing process.
- **Smart Manufacturing** to reengage manufacturers and to enhance the movement towards embracing change on a cultural and business planning level, to directly deploy relevant technologies and practices, and to establish a focused effort on the development of best practices and innovation within the greater ecosystem. As our manufacturing base becomes more reliant upon automation, process data collection will help us make the management decisions necessary to optimize productivity – What skill sets do we require of the remaining workforce? How do we ensure that critical production equipment does not cause unscheduled downtime, etc.
- **The Industrial Internet of Things** - The use of Internet of things technologies to enhance manufacturing and industrial processes, incorporating machine learning and big data technologies to harness the sensor data, machine-to-machine communication and automation technologies that have existed in industrial settings for years. Coupled with smart manufacturing, will provide producers with optimized uptime.
- **Cloud Computing and Cybersecurity** as essential elements of the 4.0 endeavor. The region boasts tremendous expertise in this area, inclusive of founders of innovative cloud products and services. A focus on deploying the inherent expertise in these areas is a tremendous asset to the companies in the region, but also to the emergence of a regional specialty.
- **Additive Manufacturing & Advanced Materials** - Additive Manufacturing is the construction of complex three-dimensional parts from 3D digital model data by depositing successive layers of material. Advanced Materials focuses on new materials and modifications to existing materials to obtain superior performance in one or more characteristics that are critical for the application under consideration. They can also exhibit completely new properties. In many cases, these parts can not be produced with traditional subtractive machining processes.
- **Modeling, Simulation, Visualization and Immersion** – A set of technologies used in the design, analysis, verification and validation on a product to improve quality, processes, training techniques and situational preparedness. Such as validating a complex CNC machining program prior to cutting any metal, or visualizing a mechanical repair process utilizing virtual reality simulations.

- **Robotics** - Mechanical or electrical engineering coupled with computer science used to design, construct, operate and apply robots, including the computer systems for their control, sensory feedback and information processing. Also includes part fixturing design and systems integration into larger automation process lines.

3.1.3 How would they work with the NE collaboration, and what role would the steering committee play in helping identify demonstration sites etc

The NE collaboration consists of key leaders and conduits to the regional industry and the various players and stakeholders in each State. They possess tremendous knowledge of each of their economies, who the key players are, what their assets are, who the best multipliers are, and are basically in possession of much of the fundamental information needed for this project to hit the ground running. We will develop a means of working with the individuals that make up NERDIC that works best for each of them and most specifically to extract relevant information and data and to field recommendations and requests. These individuals are critical to the success and pace of this project. Moreover, we would suggest that NERDIC consider requesting inclusion in the Annual Conference of New England Governors and Eastern Canadian Premiers in September. An announcement or discussion or working session or hybrid thereof, can be done in any number of ways since it will be virtual this year. The fact that the Eastern Canadian Provinces are included provides an opportunity to start discussing cross border collaboration, trade, and mutual economic benefit.

3.1.4 Where do they think they can model real innovation and build enthusiasm for Industry 4.0 in the supply chains.

There are various programs that can be presented to build enthusiasm both for Industry 4.0 and for the ecosystem. The key to building enthusiasm is to demonstrate innovation in the environment that is relevant to the audience. In addition, one has to provide for a clear pathway to revenue generation. Demonstration projects are a great means of promoting innovations and capturing and disseminating best practice through the development and analysis of a live project. This can help build an evidence base to test and support industry improvements and create a foundation for understanding the importance of Industry 4.0 readiness, the reason for the investment, and the expectations for business capture and growth.

A program that brings the primes together with the lower tiers with a specific focus on discussing the needs and expectations the primes have of their suppliers relevant to advanced technologies and capabilities and what that business means in terms of opportunity, would be a recommended program. Moreover, it is important to disseminate information on a variety of case studies that provide evidence of the need for this effort on the part of the supply chains. These suggestions are all about communication and addressing pain points. They are a hands-on means for creating a culture of collaboration and innovation.

3.1.5 What is the work plan that they foresee pursuing?

Following is a basic outline of the projected work plan:

New England Regional Defense Supplier Network Readiness Facilitation Work Plan			
ACTION	**MILESTONES**	**DUE DATE**	**LEAD**
Meet and interact with the NERDIC Steering Committee and key members of the coalition	-Adjust and agree upon definitive workplan -Interview individual members to extract information, recommendations, requests -Establish communication methodology thereafter	8/3/20 – 8/7/20	Project Manager
Engage key ecosystem members across the region	-Develop all appropriate messaging -Establish initial stakeholder list -Officially announce the grand initiative -Schedule conversations with key players/stakeholders to establish foundation and request cooperation -Continue to broaden communication circles and methodology and maintain the ever growing engagement -Convene stakeholders physically or virtually for initial roll-out; either in one venue or several tbd	8/10/20 – 9/21/20	Project Manager
Document existing relevant assets, innovations, programs, best practices, and collaborative approaches	-Develop format and criteria for inclusion -Establish best sources -Extract relevant information from existing databases and other sources -Research accordingly -Write report -Ensure that all information required for uploading to the portal is simultaneously gathered	8/10/20 – 10/5/20	Project Manager
Develop and establish the Industry 4.0 Preparedness Program	-Establish Technical Advisor service and program. See Figure 1 -Establish necessary additional workshops and potential schedule -Establish informational and educational components that can be utilized by partners across the ecosystem and in the portal -Roll-out recruitment	8/10/20 – 8/2/21	Optimize Team Lead

	-Begin company assessments -Provide customized capacity recovery or utilization and capacity building to companies post assessment -Continue the cycle		
Establish specialized ecosystem leaders located throughout the region to provide for a system that lends itself to continuity, results, and sustainment	-Develop the criteria for the specialized leaders; Geographic? Topic specific? Highly specialized? Personality type? Connectivity? Or all of the above? -Create network and process to sustain activity levels	10/1/20 – 8/2/21	Project Manager
Build Portal	-Agree on the elements the ultimate portal should contain and plan for that. -Agree on the stages of development based on budgetary constraints -Establish a plan for innovation and sustainment vis a vis the portal. -Extract and utilize what is possible from RADE -Build Stage 1	9/1/20 – 8/2/21	Optimize Team Lead
Establish pilot programs	-Determine if the recommended original 3 pilots are still relevant -Develop pilots and launch	10/1/20 – 8/2/21	Project Manager and Optimize Team Lead
Institutionalized Solution	-Build a sustainment plan -Imagine an Industry 4.0 hub/spoke -Build revenue streams and options	12/1/20 – 5/1/21	Project Manager and Optimize Team Lead

3.1.6 What partner organizations do they plan to include?

The great aspect of developing an ecosystem in New England is that the region works together better than any other region in the U.S. There are numerous organizations that need to be tapped as partners, as multipliers, as communicators, and certainly as members of the ecosystem. The initial list we are looking at includes, but will certainly not be limited to the list referenced below. Any number of the organizations in the referenced list could be a partner. However, one of the first conversations should be with the newly opened New England Advanced Manufacturing Hub. Much of what you want to accomplish may be in tandem with this new entity. A partnership will need to be established for certain.

- New England Advanced Manufacturing Hub
- MEPs region-wide
- PTACs region-wide
- 6 State Economic Development offices
- 6 State International Trade Offices
- Additional International Trade Programs

- US Dept. of Commerce
- SBDCs region-wide
- SBA region-wide
- The New England Council and inclusive of their Defense Committee
- New England Congressional Delegation
- Chambers of Commerce region-wide
- All Aerospace and Defense trade associations, consortia, clusters and collaboratives throughout the region
- Industry blogs and media outlets
- Hi Tech associations and collaboratives throughout the region
- Academia: State universities, private universities, technical colleges, community colleges, etc., that are engaged in Industry 4.0
- Incubators and Accelerators throughout the region
- The Primes
- The Edge Innovation Center by GD
- Labs; ie Draper and Lincoln

In addition, a quick search has turned up a number of assets relative to Industry 4.0 that would be explored in terms of partnerships, but would certainly be a part of the ecosystem. The aforementioned and the following is a sample list to demonstrate that we have an excellent grasp of the elements of a potential ecosystem in New England.

Industry 4.0 Technology Resources in New England

Massachusetts

- Dassault Headquarters, Waltham: have a 3-D experience land and a 3-D Innovation Center
- Mass Technology Collaborative
- MASS MEP: Panels in digital transformation, robotics automation, NIST cybersecurity framework, cybersecurity maturity model certification
- U of Mass Amherst: Cyber Security Institute
- Mass Tech: Mass Cyber Center, and lists of everything cyber for the state
- MIT: Tata Center for Technology and Design, Deshpande Center for Innovation, Sandbox Innovation Fund and Lab
- Center for Additive and Digital Advanced production: online certification in additive manufacturing
- WPI: Areas of research: Robotics and Internet of Things, Advanced materials, and advanced manufacturing; cyber, data and security
- Federal lab in Natick Solder system focus on advanced materials
- Boston AI Network.com
- Boston University: AI research initiative and Center for AI and events

- 2019 Mass manufacturing innovation initiative gave $5.2 million to Bridge Water State and Stonehill Colleges for manufacturing initiatives.
- Labs for education and application prototypes MIT (also additive manufacturing, Bridge Water State, Stonehill College and WPI.)
- New England Advanced Manufacturing Hub/Tulip.
- Mass Robotics.org
- New England Robotics Validation and Experimental Center at U. Mass Lowell. It is 1 of 3 NIST test facilities in the nation. Indoor testing site.
- Joint Base, Cape Cod: an FAA joint test site shared with NY for unmanned air systems
- Center for Marine Robotics, Woods Hole Oceanic Institute: Advancing the ways in which people and machines work together
- Harvard Robotics Lab
- Sanofi of France opened new digital manufacturing lab in 2019 in Framingham
- Draper Labs, Cambridge: develop and deploy advanced technology solutions or the world's most difficult problems
- MIT Lincoln Lab: National R&D lab: prototyping and use advanced technologies to meet critical needs. Work in a number of Industry 4.0 Sectors.
- The Edge Innovation Center by GD

New Hampshire

- Advanced Regenerative Tissue Manufacturing Institute (ARMI)
- FIRST Robotics
- NH Tech Alliance
- UNH: Center for Cyber Security
- SNHU: Cyber Security Center of Excellence
- www.manufacturing.gov National manufacturing portal
- UNH: John Olson Advanced Manufacturing Center

Maine

- University of Maine, Cyber Range in Augusta. Available for students and businesses. Powered by Cyberbit. Certifications offered.
-
- University of Maine: Advanced Manufacturing Center. 2019 U Of Maine had largest 3D printed boat in the world
- University of Maine, Orono: Composite's Center
- University of Maine: AI initiative
- MaineSail: Software Agent and AI LAB, Autonomous underwater vehicles
- Maine Robotics, Nonprofit
- University of Maine: Black Bear Robotics

Vermont

- Received recent grant from DOD to use for Additive Manufacturing Capabilities and Precision Metal work
- Vermont Additive Manufacturing Consortium
- Lawrence Livermore National Lab: Advanced Manufacturing Lab opened to industry and academia in 2018
- AI Task Force

Rhode Island

- SAMI: Ship building and Advanced Manufacturing Institute
- Southeastern NE Defense Alliance (SENEDIA) Naval Warfare Center (NUWC)
- RI Corporate Cyber Security Initiative: Pell Center
- Steam Engine USA: Industrial Design and Advanced Manufacturing
- Rhode Island Office of Innovation, Providence
- Rhode Island Manufacturer's Association

Connecticut

- UConn: Cyber Security Center
- University of New Haven: New Cyber Security Center
- Center for Advanced Technology (CAT): Additive Manufacturing, Composite Center, Prototyping, Technology Demonstration Center and Training Center, East Hartford
- Advanced Manufacturing Center
- New-Advanced Robotics Manufacturing Institute (ARM)
- United Technologies Research Center
- Stanley Black and Decker: World's 1st: Manufactory 4.0 opened in Hartford, 23,000 square feet of state-of-the-art manufacturing space. New facility highlights Black and Decker's success with integrating 4.0 practices into their policies, improved communication between humans and automated technology, use of interconnected systems to improve the collaboration between plants, and use of big data to boost productivity.

3.1.7 What do they envision as a plan for creating sustainability?

There are many paths toward sustainability. Leveraging federal resources and programs is a good idea as the effort is being established. However, everyone is in agreement that self-reliance is the only real sustainable solution. As we develop the program, we will look at the available assets, where the gaps are, what partnerships can be established, what does not need to be duplicated, and zero in on what the companies up and down the supply chain find valuable enough that they would pay for it, and that will be the direction we go in. We envision anything from a membership or co-membership organization to very specific showcases between the primes and their potential supply chain, to revenue generating assessment and capacity building offerings that are not available elsewhere, to teaming arrangements for business capture, etc. However, we know for certain that the portal would be absolutely key. As such, we would plan to focus significantly on generating that unlimited value, in essence, turning the portal into a business itself and a tremendous asset to the region, to the companies, and to the DOD.

3.2 Background & Professional Experience

3.2.1 Business organization, company size and resources

LSI is headquartered in Layton, Utah and has an office in Washington DC. LSI has 89 full-time employees and over 80 site consultants in more than 18 states across the U.S. and the District of Columbia, with a presence in DOD and FedCiv site locations. LSI also has a presence internationally from the UK to Singapore.

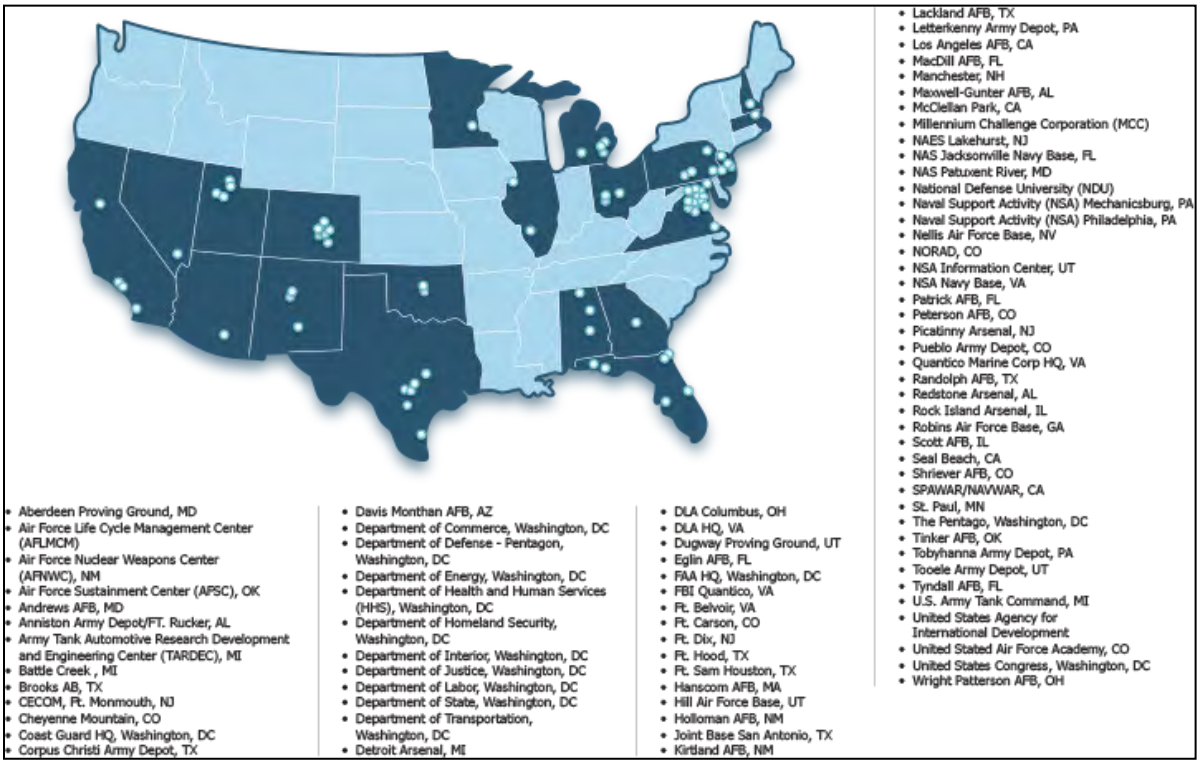


Figure 2 LSI presense

Company Locations

Headquarters
1530 N. Layton Hills Parkway, Suite 201
Layton, UT 84041
Tel: (801) 776-0062

DC Presence
Grange Building
1616 H Street NW, Suite 600
Washington, DC 20006
Tel: (202) 412-4100
Website: www.lsiwins.com

3.2.2 Experience relevant to the proposed project and list all current or past State projects

LSI is a leader in strategy, consulting, economic, and business development support, especially in the development of strategies and implementation plans for non-profit organizations and interaction with international businesses and organizations. Since 1972, LSI has positioned its clients and customers to win. LSI provides both government and commercial entities with creative solutions. Using market intelligence and professional experience, our experienced consultants work with business, military, and political leaders to develop and implement strategies to help businesses compete in the marketplace. We provide the information and business processes needed to translate growth objectives into reality. Our economic development programs help communities and businesses increase contract revenues, accelerate job growth and provide the State with a higher return on investment for economic development services.

Following is a summary description of prior work experience of the Economic Development, Defense-related projects LSI has performed:

LSI – ED Past Performance	
Defense Alliance / Advanced Power & Energy Cluster (SBA RIC)	**2004 – Present**
LSI manages Defense Alliance (www.defensealliance.com), a regional business consortium for the defense industry located in Minneapolis-St. Paul that was founded in 2004. The Alliance began among just a handful of small businesses in the Twin Cities area, and now boasts a membership of over 800 companies and other entities in 34 states. Since 2011, it has been funded by the U.S. Small Business Administration (SBA) as one of the 14 Regional Innovation Clusters (RICs) – and is one of three Advanced Defense Technology clusters (the Advanced Power & Energy Cluster (www.powerfordefense.com). The Defense Alliance and its staff of experienced industry consultants specializes in "finding, filtering and facilitating" technologies that can contribute product and service innovations for the nation's defense needs – and that commercialize for a variety of other markets. Since receiving SBA funding under the RIC program, Defense Alliance has helped member companies gain over $200 Million in Federal, R&D and commercial contracts; and assisted in the creation of over 2,200 jobs – a greater than 50:1 return on investment for the Federal tax dollar. The organization continuously convenes industry, government, academia and nonprofit entities, and holds a minimum of four events and numerous other informational webinars annually, spanning a multitude of topics including Federal contracting and accounting practices, entrepreneurship, commercialization, technology transfer, successful R&D pursuit and many others.	
Utah Advanced Materials & Manufacturing Initiative (UAMMI)	**2015 – Present**
Under the direction of the Utah State Governor's Office of Economic Development, and through the University of Utah, LSI built a coalition comprised of industry, academia, and government members with the goal of growing the advanced materials cluster within the State of Utah. Under the State of Utah's cluster-based economic development program, LS helped build a robust ecosystem focused on advanced materials and manufacturing in Utah. This led to the development of the Utah Advanced Materials and Manufacturing Initiative (UAMMI). Over the past 3 years, LSI has actively and successfully led a Utah Advanced Materials and Manufacturing Initiative (UAMMI) application, resulting a large in investment funding by the Utah Legislature to formalize the UAMMI coalition. Under this coalition, LSI developed a coordinated front of industry, military, academic, public/private partnerships, investors, workforce development, industry associations, community leaders, state and local government support and a solid commitment of leadership by the University of Utah. LSI led a grant team for the state of Utah's response to the U.S. Department of Commerce, Economic Development Administration (EDA) request of round two designations of Investing in Manufacturing Communities Partnership	

(IMCP) of which Utah was designated in July 2015. This is a national opportunity to confirm and expand Utah's leadership in growing the advanced materials and manufacturing ecosystem.

State of California Aviation Management Unit	**2001 – Present**

LSI has been the exclusive Aviation Logistical Support Contractor for the California Department of Forestry and Fire Protection (CAL FIRE) at their Aviation Management Unit (AMU) continuously since 2001. CAL FIRE AMU maintains and operates a fleet of over 52 Wildland Firefighting Aircraft that includes S2T Air tankers, OV- 10 Aerial Tactical Command & Control fixed wing aircraft and Super Huey UH-1H Helicopters, along with additional Program Support Aircraft. The S2T Air tankers and OV-10 Tactical assets are deployed at various CAL FIRE Air Attack Bases statewide during the fire season (May to November) while the Helicopter assets are deployed year-round at various statewide Helitack airbases, due to additional non-fire related emergency rescue tasking. LSI employees work alongside the CAL FIRE AMU staff in their depot level aircraft maintenance facility located at McClellan Park near Sacramento, California, or as needed at various state-wide locations. LSI's current full time staffing of twenty two employees.

The primary function of the LSI contact with CAL FIRE is adequately maintaining the inventory of thousands of rotable (repairable) aircraft components, consumable parts, fasteners and general supplies needed for depot level aircraft fleet maintenance. Increasing the difficulty level of this logistical effort is the fact that each CAL FIRE aircraft are surplus military equipment that was built in the1960's thru the 1980's and are no longer supported by the DOD federal supply system.

Center for Aerospace Supplier Defense Quality (CADSQ) Program – Oklahoma	**2007 – Present**

The Center for Aerospace Supplier Defense Quality (CADSQ) Program mission is to assist Oklahoma companies to become qualified suppliers for the Department of Defense (DoD) and DoD prime contractor requirements, provide economic development and job creation for Oklahoma's aerospace industry and develop an improved supplier base for Oklahoma's military installations. Through the success of this program, the coalition of Oklahoma manufacturers and businesses has brought new federal contract dollars into the State. This new business has created new jobs, increased economic contribution and sprung new competitive advantage for Oklahoma manufacturers. LSI provides mentoring, technical, business, economic development and workforce training for small and large businesses through the development of business strategies, opportunity assessment and capability matching along with bid preparation and guidance on program execution. LSI supplies the infrastructure, tools, processes, and resources to support clients with strategic and tactical marketing.

USAF Landing Gear Prime Vendor Contract (LGPVC)	**2008 – Present**

The Landing Gear Prime Vendor Contract (LGPVC) is a Small Business Set-aside, multiple award, indefinite delivery/indefinite quantity ten-year contract with a ceiling of $1.5B for 1,033 United States Air Force (USAF) and Defense Logistics Agency (DLA) managed competitively sourced landing gear spares. LGPVC is a unique long-term strategic contract for the management and development of the critical yet diminishing vendor consortium. Landing gear components are often complex and made of high strength steel and specialty metals. Each prime vendor is on contract for and must be able to provide every national stock number (NSN) on the LGPVC basic. The prime is required to secure a manufacturer for each item, manage its subcontractors to ensure delivery of a quality part on-time or early, and provide the Government an appropriate level of customer support, including communicating in a professional manner and through appropriate channels, making good faith efforts to support urgent requirements, responding to requests quickly, etc. To earn additional terms beyond the basic term of the contract, prime contractors must achieve continuous improvements in quality, on-time delivery, production lead-time (PLT), and customer support relative to the other awardees as specified in the Award Term Plan. Primes' Award Term Plan scores, updated quarterly, are included in best value award decisions.

Utah Governor's Office of Economic Development (GOED)	**2016 – Present**

GOED/PTAC is a program designed to accelerate economic development by developing revenue opportunities at local, state, and federal levels for Utah businesses. The team is served by members from the Utah Governor's Office of Economic Development

(GOED)/Procurement Technical Assistance Centers (PTAC), and LSI Business Development, Inc. (LSI). Support is provided to local innovators, entrepreneurs, emerging companies, small and medium sized businesses, including: Start-Up, 8(a); HUBZone; Service-Disabled Veteran-Owned; Native American; Woman-Owned; and others. The businesses represent a broad cross-section of products and services ranging from information technology/software, water optimization and detection, energy sustainability and efficiency, automation, composites/manufacturing, diagnostics, reverse engineering, environmental remediation, construction, transportation, cyber systems, UAS/UAV, robotics, sensors, etc. As part of this program, LSI mentors/consults with approximately 1,000 Utah companies each year.

SBA Small Business Teaming Initiative	**2011 – 2013**

LSI's Small Business Teaming Pilot Program (SBTPP) grant established by Congress under the Small Business Jobs Act of 2010, Pub. L. No. 111-240 (the Jobs Act), created a coalition of small businesses prepared to team and pursue large federal contracts. LSI's strong regional relationships and partners in the workforce and business development community and our outreach with legal, technical and business consultant expertise and staff resulted in over 2,354 businesses registered on our teaming database over a two-year period. LSI provided overall program design, project management and administration, which included extensive collaboration with federal, state and local government entities to leverage all resources and enhance the project's strategic capability of reaching business partners and build coalitions throughout the US. LSI provided extensive training, support and government contracting expertise. Multiple teaming arrangements, proposal support, webinars and individual consulting was executed daily throughout the program. Participants in the program received daily emails about opportunities based on their NAICS, keywords or other filter sources. Overall, 5,596 opportunities were being watched during the grant period. Over 6,105,107 total opportunities were sent matching the NAICS/Classification for users. Over 2,000 companies were actively engaged in potential teaming discussions. LSI hosted 198 sources sought/opportunity based webinars over the two year grant period and presented seven "Winning Federal Businesses" workshops in five states. Timeline: September 2011 – December 2013.

EuroAtlantic Assurance & Transatlantic Coalition	**2015 – Present**

LSI manages the EuroAtlantic Assurance Coalition (http://www.europeanreassurance.com) which educates policy makers, members of government, and the public, to advocate for a strong and assertive policy to build security and diplomacy in Europe. Members of the coalition support the European Reassurance Initiative (ERI), and encourage all NATO governments to strengthen their defense readiness https://twitter.com/NATOAssure/). The coalition began in 2015.

The coalition includes members that represent the full range of policy analysis, from the defense and security industry to good government and transparency advocates, for a common vision of European security and a safer world. The group convenes several times annually to provide support and to participate in briefings that include industry, think tanks, and government and academia entities. The topics pursued include the effectiveness of sanctions; best practices on using extraterritorial investigation and prosecution to dismantle the corrupt enterprises that extend influence in NATO countries; options on how to strengthen transatlantic cooperation in developing domestic defense industrial capacity; and options on how to expand available resources for military hardware and intelligence capability.

Defense Orientation Conference Association (DOCA)	**2017 – Present**

Since June 12, 2017 LSI been providing organizational infrastructure and administrative support and managing the diverse aspects of the Defense Orientation Conference Association (DOCA). This management includes organizing conferences for DOCA members and guests with support from members of the Department of Defense and members of the Department of State, along with other academic speakers. DOCA is organized as a 501(c)(3) non-profit association. It maintains a non-political and non-partisan perspective and does not advocate for the needs of any particular military service, defense concept, or acquisition program. The association has no associated advocacy or lobbying arm. DOCA's principal continuing education initiatives are built around conferences both in the United States and abroad that are supported financially by participating members. Most conferences, in whole or in part, include engagement with the U.S. armed forces at military installations. Conferences abroad routinely include engagement with the U.S. diplomatic personnel.

AeroMontreal Aerospace and Defense Cluster Development	**2018 – Present**

Aéro Montréal, Quebec's aerospace cluster, is a strategic think tank created in 2006 that groups all the major decision makers in Quebec's aerospace sector, including companies, educational and research institutions, associations and unions. LSI provides a program to assist their members in accessing the U.S. military/government market. Services include: Opportunity identification and development, training, strategic assessment and development, capture, proposal writing, and more.

Other Cluster Initiative / Consortium	Dates
Rhode Island Defense Cluster Initiative	2009-2016
State of New York – Long Island Forum for Technology (LIFT)	2010 - 2015
Military Installation Protect & Grow	2016 – Present
Coalition for Fair Procurement	2016 – Present
Lockheed Martin SCM Initiative	2016 - 2020
AAR Performance Based Logistics (PBL) Supply Chain Management (SCM)	2016 – Present
State of Virginia Rural Manufacturing Initiative	2018-2020
State of South Dakota Military Coalition in Rapid City	2018 -2020

4.0 References

Ben Hart
Managing Director
State of Utah, Governor's Office of Economic Development (GOED)
60 E S Temple, Salt Lake City, UT 84111
801-538-8799 – Office
801-649-9041 – Cell
benhart@utah.gov

Dr. Tulinda Larsen
Executive Director
Utah Advanced Materials and Manufacturing Initiative
Cell (443)510-3566
tlarsen@UAMMI.org
450 Simmons Way
Kaysville, UT 84037

Matt Stevens
DoD Office of Economic Adjustment (OEA)
Former Director of the SBA Regional Innovation Clusters
2231 Crystal Drive, Suite 520 Arlington, VA 22202
Telephone: 703-697-2130
matthew.t.stevens24.civ@mail.mil
(703) 697-2082

Certificate of Compliance Form

CERTIFICATE OF COMPLIANCE

This form must accompany your Bid

For a bid to be considered valid, this form must be completed in its entirety, executed by a duly authorized representative of the bidder, and submitted as part of the response to the proposal..

A. **NON-COLLUSION:** Bidder hereby certifies that the prices quoted have been arrived at without collusion and that no prior information concerning these prices has been received from or given to a competitive company. If there is sufficient evidence to warrant investigation of the bid/contract process by the Office of the Attorney General, bidder understands that this paragraph might be used as a basis for litigation.

B. **CONTRACT TERMS:** Bidder hereby acknowledges that is has read, understands and agrees to the terms of this RFP, including the terms outlined in the sample State of Vermont Standard Contract for Services and associated attachments.

1. Bidder agrees to the provisions set forth in the State of Vermont's Standard Contract Attachment C – Standard State Contract Provisions, and Attachment D – Other State of Vermont Contract Provisions
2. Bidder (except an individual doing business in his/her own name) agree to register with the Vermont Secretary of State's office http://www.sec.state.vt.us/tutor/dobiz/forms/fcregist.htm
3. Bidder agrees to obtain a Contractor's Business Account Number issued by the Vermont Department of Taxes http://tax.vermont.gov/ .

C. **ADDENDA:** Acknowledge receipt of Addenda associated with this RFP:

Addendum No.:	1	Dated:	15 June 2020
Addendum No.:		Dated:	
Addendum No.:		Dated:	

D. **VERMONT TAX CERTIFICATE:** To meet the requirements of Vermont Statute 32 V.S.A. § 3113, by law, no agency of the State may enter into, extend or renew any contract for the provision of goods, services or real estate space with any person unless such person first certifies, under the pains and penalties of perjury, that he or she is in good standing with the Department of Taxes. A person is in good standing if no taxes are due, if the liability for any tax that may be due is on appeal, or if the person is in compliance with a payment plan approved by the Commissioner of Taxes, 32 V.S.A. § 3113

In signing this bid, the bidder certifies under the pains and penalties of perjury that the individual or company is in good standing with respect to, or in full compliance with a plan to pay, any and all taxes owed the State of Vermont.

E. BIDDER INFORMATION & CERTIFYING SIGNATURE

Vendor Name:	LSI BD	Contact:	Christine Bond
Address:	1530 N Layton Hills Pkwy	Telephone:	801-776-0062
City/State/Zip:	Layton, UT 84041	Fax:	
email:	cbond@lsiwins.com		
Vendor Website:	www.lsiwins.com		
Signature:	Christine Bond	Date:	July 9, 2020
Printed Name:	Christine Bond		

END OF CERTIFICATE OF COMPLIANCE

Price Schedule

PRICE PROPOSAL

This form must accompany your Bid

1. The bidder hereby acknowledges they have read, understand and agree to the terms of this RFP.

2. The bidder hereby acknowledges they have read, understand and if awarded agree to the State's standard contract conditions and requirements; and procure the required insurance provisions as set forth.

3. Bidder's Price Proposal must be valid for a minimum of 30 days.

4. Price Proposal: The base contract term is one year with the option to renew for up for an additional 12-month period upon mutual agreement

5. Cost Itemization (add/delete rows as needed)

Job Title		Hourly Rate	Hours	Subtotal
1.	Project Lead	$46.99	2080	$97,739.20
2.	Administrative Assistant	$29.30	2080	$60,944.00
3.	Event Coordinator	$95.00	120	$11,400.00
4.	Communications Lead	$120.00	80	$9,600.00
5.	Data Analyst II	$95.00	80	$7,600.00
6.	Data Analyst I	$75.00	120	$9,000.00
7.	Metadata Operations Lead	$150.00	200	$30,000.00
8.	Business Plan Developer (sustainment)	$95.00	60	$5,700.00
Expenses		**Rate**	**Mileage**	**Subtotal**
Travel		$0.58	7500	$4350.00
Equipment		$1,500.00		$1,500.00
Supplies		$1,000.00		$1,000.00
Event Estimates (4)		$1,350.00		$5,400.00
Software		$6,000.00		$6,000.00
Portal Design & Implementation		$500,000.00		$500,000.00
Pilot Programs (3)		$30,000.00		$90,000.00
Training		**Description**		**Subtotal**
Consortia Style Training on Industry 4.0		6 hour virtual class with breaks @ $2,200 per session. We can do one session per week for a maximum of 50 classes in a year = $110,000 maximum.		$110,000.00
Consortia Style Assessment following Training on Industry 4.0		6-8 hour virtual session with breaks, $2,800. We have the capability of doing 5 session per month or 60 per year =$168,000		$168,000.00
Follow on Consulting		On site capacity recovery or utilization and capacity building. $1,500 per day for +/- 10 days. This is a program that we believe the company should share in the cost @ a minimum of 50% if not the entire cost. The number of total projects during the year is limited to about 5 given the		$75,000.00

	comprehensive nature of the service = $75,000 maximum. It is further suggested that these can serve as pilots and/or case studies.	
Technical Advisory Services	A technical advisor is available for follow on project management work and is primarily noted herein as dedicated to following up on the on-site capacity building work. $350/hour for an average of 10 hours per project = $3500 per project maximum. If this is applied to 5 pilot projects, the maximum total would be $17,500	$17,500.00
General Training Modules	Doing Business with the GSA	$1,200.00
General Training Modules	Doing Business with DARPA	$1,200.00
General Training Modules	Teaming with Prime Contractors	$1,200.00
	Total Project Cost:	**$1,214,333.20**

6. Rate or percent increase (if necessary) for two optional 12-month renewals:

   Renewal Option 1 (Year 2) rate or percent increase not to exceed: _____3%_____

7. Expenses incurred in relation to this project are not reimbursable.

8. Vermont Tax Certificate: To meet the requirements of Vermont Statute 32 V.S.A. § 3113, by law, no agency of the State may enter into, extend or renew any contract for the provision of goods, services or real estate space with any person unless such person first certifies, under the pains and penalties of perjury, that he or she is in good standing with the Department of Taxes. A person is in good standing if no taxes are due, if the liability for any tax that may be due is on appeal, or if the person is in compliance with a payment plan approved by the Commissioner of Taxes, 32 V.S.A. § 3113.

   In signing this bid, the bidder certifies under the pains and penalties of perjury that the company /individual is in good standing with respect to, or in full compliance with a plan to pay, any and all taxes due the State of Vermont as of the date this statement is made.

9. Bidder Information & Signature:

Logistic Specialties, Inc.

Vendor Name:

July 9, 2020
Date:

Authorized Agent Signature:

Christine Bond
Printed Name:

Addendum 1

VERMONT

Vermont Agency of Commerce and Community Development Department of Economic Development
1 National Life Dr, Deane C. Davis Bldg., 6th Floor Montpelier, VT 05620-0501

New England Regional Defense Supplier Network Readiness Facilitation RFP

ADDEDNUM 1

TO ALL BIDDERS OF RECORD:

This Addendum consists of 1 page(s).

Acknowledge receipt of this Addendum by entering its number and date on the Proposal Form. This Addendum forms a part of the Contract Documents and modifies them as follows:

Questions and Answers:

1. Within the Price Proposal, under #7 it says "Expenses incurred in relation to this project are not reimbursable". My question (to clarify): if I incur federally allowed travel /mileage cost, rental (daily) expense for potential seminar/demo sites, IT/website subcontracts, software license expense, printing and supplies….. it would not be allowed under this RFP?
   Projected expenses should be factored into the cost proposal as a budget line item. In this regard "non-reimbursement of expenses" refers to process and procedure than allowable costs. We don't want receipts submitted to our finance division for reimbursement, we want them invoiced in accordance with the budget line item.

2. Under 3.1.3, up to what percentage will be retained?
   If retainage is contemplated within the contract, it typically does not exceed 10% of contract amount.

END OF ADDENDUM #1

Resumes

5 Pemberly Drive
Windham, ME
04062

JOHN P. DUBOIS
President, optimize, Inc.
President, Tandem Training Corp

(207) 831-8638
johnd@optimizeincorporated.com

PROFESSIONAL SUMMARY:
Mr. DuBois has over 30 years of manufacturing and design experience across several industries including financial services, healthcare services, molded fiber, shipbuilding/ship repairing, secondary wood products, textiles, steel can manufacture, aerospace and automotive products. As a nationally recognized Lean Six Sigma Facilitator/Sensei, he has delivered Lean Six Sigma facilitation services in all four public Navy shipyards, NAVSEA, NAVAIR, and the U.S. Air Force as well as both of the largest Private Navy Shipbuilding Primes and the world's second largest Aerospace Prime. His background includes experience with the Toyota Production Systems, Lean, Six Sigma, Theory of Constraints, management of multi-million-dollar contracts, and supply chain development. As an inventor and innovator, he has designed and patented several consumer products in use today and has two patents building training systems pending. He has maintained involvement with his community as a youth coach and volunteer. He has established his role in the economic development of Maine Manufacturing by leading the Manufacturers Association of Maine (MAME) program called Business Retention and Expansion (BRE) as well as taking a leadership role on the Business Services Division within the Association.

EDUCATION AND TRAINING:
BS, Industrial Technology (Concentration in Operations), University of Southern Maine, 1988
Toyota & Mitsuia Sensei Trained in the Toyota Production Systems from February, 1997 through January, 2000
NIST MEP Master Trainer certified to deliver all Lean and Facilitation based training courses offered by the NIST MEP University from June, 2000 through May, 2007.
Time Wise Management Systems "Top Gun" Certified to deliver entire Time Wise Suite of products based upon the Toyota Production Systems from September, 2003 through May, 2007

AFFILIATIONS:
- Service Member of the EDGE Innovation Network
- Authorized Integrator of CribMaster Products
- Authorized Partner of The Five Behaviors Of A Cohesive Team
- Authorized Partner of Everything DiSC
- Leadership Team Member of the Business Services Division of the Manufacturers Association of Maine
- Senior Member, Society of Manufacturing Engineers, 1988 to Present
- Member, Association of Manufacturing Excellence, 1988 to Present
- Founding Member and "Key Person," Bluegrass Automotive Manufactures Association, 1997 to 2000
- Member, Lean Special Projects Task Force, (an association of National Institute of Standards Technology (NIST) recognized experts), 2000 to May 2007
- Licensed youth sports (soccer & hockey) coach, 2004 to 2014

CHRONOLOGICAL WORK HISTORY:

President & Owner, optimize, Inc., Windham, Maine (September 2009 - Present)
All aspects of industrial engineering – (industrial engineering department in a can is how one of my biggest clients described me)
- **Enterprise Transformation** programs align people, process & technology with the business vision of executive management and investors.
- **Supplier Development** programs mature Enterprise Transformation within key & critical suppliers of prime contractors, including filling interim management roles

- **Supply Chain Integration** programs focus on the improvement of flow in-between customer & supplier relationships.
- **Innovation** programs for concept development to commercialization of incremental, next generation, evolutionary or revolutionary products & services. Innovation as a process.
- **Lean** projects focus on what the customer values, aggressively eliminating waste in the relentless pursuit of perfection, including equipment related waste.
- **Six Sigma** projects focus on what the customer specifies, seeking to continuously improve by identifying and removing the cause of process variation, including Total Productive Maintenance
- **MRO Inventory Management** projects controls MRO and materials consumed in the production of a product, but not found on the bill of materials. Eliminates the "hidden factory" of inventory cost.

President & Owner, Tandem Training Corp, Windham, Maine (January 2102 – Present)
Technical and soft skill training and consulting that improves the economic viability of companies and the surrounding communities – Business Retention and Expansion (BRE). Topics include: Innovation & Collaboration, Executive Facilitation, Project management, Leadership, Communication, as well as other HR and compliance courses.

Program Manager, Patrona Corporation, Sterling, VA (May 2007 – February 2010)
Lean Six Sigma Sensei supporting NAVSEA 04XU and 04XC. Key responsibilities and accomplishments:

- Provide professional facilitation services to the Submarine and Carrier Value Stream Managers (NAVSEA 04XU & 04XC) for critical business processes, including facilitation of the annual Executive Planning Sessions for the carrier and submarine communities.
- Provide Lean Six Sigma Sensei (coaching & mentoring) services to NAVSEA and Shipyard Green and Black Belt certified facilitators to successfully complete process improvement initiatives (NAVSEA 04XP).
- Provide NAVSEA Lean Six Sigma College curriculum modifications as necessary to effectively train additional Green and Black Belts
- Provide Integrated Project Team Development curriculum with an eye towards successfully implementing Lean Release Letters as well as identifying and mitigating risk.
- Facilitated Carrier Team One and Submarine Team One process improvement initiatives with an eye toward sharing best practices across platforms to gain continuity including Executive Planning Sessions for both platforms.

Vice President of Advanced Resource Development, Time Wise Management Systems, Augusta, Maine
(September, 2004 – May, 2007
As one of the Company's senior managers, contributed to business planning, strategy formulation, product development, and resource and capacity development. Key responsibilities and accomplishments:

- Managed multi-million dollar contracts with the US Government as well as Private Industry
- Contributed to marketing functions of:
    - scoping the project
    - identifying the deliverables
    - writing the Statements of Work
- Identified, vetted, trained and approved delivery resources to meet the deliverables of the statement of work
- Built program materials used to standardize delivery of the program across multiple client sites nationally
- Managed Supply Chain Development and Integration Programs for Large Primes
- Submitted two pending patents for systems designs for a comprehensive Lean training and implementation system known as the Time Wise® Product Suite.

Sr. Project Manager, Maine MEP/MEP MSI, Augusta, Maine
(January, 2000 – September, 2004)
A management consultant responsible for sales, management and delivery of process improvement projects for small to mid-sized manufacturing companies. Designer of consulting tools that standardized the consulting process for myself as well as colleagues. Key responsibilities and accomplishments:

- Partnered with Large OEMs to address key supplier issues throughout the extended enterprise (quality, cost, delivery and technology innovation). Worked with targeted tier 1 – 4 suppliers throughout the program to develop them for eventual large systems integration improving performance metrics that are beneficial to both the supplier and the OEM
- Managed several areas of the Company's national account development and supply chain improvement strategy with private and public sector clients, including the Department of Defense and numerous Fortune 1000 corporations.
- Was the major contributor to the company's Lean training and implementation tools and led in numerous client engagements.
- Transferred tools and techniques to conduct improvement activities to more than 100 facilitators including in-house resources as well as third party consultants.

Manager of Advanced Manufacturing Engineering, Gates Formed Fiber, Auburn, ME (June, 1997 – January 2000)
Managed a department of 35 technicians and engineers responsible for producing all non-production part orders (such as prototypes and pilot parts), generating productivity improvements to existing processes, and developing all secondary operation equipment necessary to meet production requirements. Key responsibilities and accomplishments:

- Reorganized three similar functioning departments into one cohesive Advanced Manufacturing Engineering group.
- Facilitated hundreds of Lean Kaizen (continuous improvement) activities including, 3P, Set-up reduction, Cellular flow / Synchronous manufacturing, Total Productive Maintenance, and 5S.
- Managed all aspects of the transition from Product Design acceptance through Product Market Readiness including:
    - Specifying and purchasing all equipment necessary to go to production
    - All training of production, maintenance, and facilities personnel related to production of product
    - Assuring production system was capable of meeting demand quantity and quality prior to turning production system over to Operations
    - Managed a department that was credited for meeting all customer-required elements of QS 9000 as well as Toyota's Supplier Quality Requirements.
    - Certified internal auditor for ISO 9000 and QS 9000.

Senior Project Engineer, Tenneco Packaging, South Portland, ME (September, 1989 – June, 1997)
Product and tooling engineer responsible for all product and tooling design and the manufacturing of all tooling to mass produce the product.
Key Accomplishments:

- Key participant of ISO 9000 Implementation Team that developed and maintained an ISO 9000 program and helped the company through three re-certifications.
- Maintained a six million dollar workload designing Molded Fibre products and the tooling required to manufacture the product.
- Provided management, engineering and troubleshooting support to six Molded Fibre manufacturing plants in North America and one in Germany
- Designed Molded Fibre products, tooling as well as tooling interfaces with manufacturing equipment.

Production Engineer, GTE Sylvania Control Devices, Standish, ME (January, 1988 – August, 1989)
Designed production systems to mass produce electromechanical devices for the Telecommunications Industry. Key responsibilities and accomplishments:

- Applied “design for manufacturability” techniques to prototype products then designed production sequence and work stations necessary to mass produce the products.
- Designed high volume automated production equipment as well as low volume manually operated workstations
- Redesigned a working prototype of Solid State Station Protector for telephone lines for mass production resulting in my first design Patent.
- Provided engineering support to equipment maintenance personnel for rapid response to equipment related production downtime

PATENTS:
Molded Fibre Cup Carrier, Des. 384,275, 1997
Station Protector for Network Interface Device, Des. 5,410.596, 1995

PATENT PENDING:
20060242005; A comprehensive method to train and aid manufacturers in identifying inefficiencies in product manufacturing process and in improving such process.

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Julie Gustafson

Entrepreneurial-minded business and economic development leader with an eighteen-year track record of successfully identifying, supporting and growing high-tech and start-up businesses across numerous industries, and experience in business ownership, managing/developing non-profit corporations, and leading economic development initiatives.

Significant experience in: Industry cluster work, program development including state-wide defense & good government initiatives; innovation identification, strategic planning, business planning, and market planning; grant writing & administration (millions); relationship-building with government leaders, legislators, corporate leaders, private and public corporations, academia, capital experts and more; team and consensus building; business coaching; financial management; public relations and speaking.

Top strengths: Relationship builder, strong work ethic, integrity, honest, multi-tasker, creative thinker, ability to maintain a sense of humor even in the most challenging of situations.

Professional Experience

JMG CONSULTING - 8/2016-current
Founder/Consultant - 2010-2011
Provide consulting services in business development, incubation, acceleration; economic development and non-profit initiatives.

Logistic Specialties, Inc: Currently, providing consulting services to determine the potential & opportunity to establish an economic development center of excellence in New England. Services include interviewing economic development leaders and legislators across New England to determine economic development issues, challenges, industry growth and demand for services.

Previously provided consulting in business incubation/acceleration with a focus on initial development and sustainability. Clients included a university business innovation center on 128 corridor Boston area, and a real-estate venture in NH.

OAKLAND UNIVERSITY, Rochester, Michigan - 9/2011-2/2016
Executive Director, Macomb-OU INC, a state designated Smartzone, Sterling Heights, Michigan

There are 15 Smartzones in Michigan, a designation that is awarded by the state and requires partnerships between an accelerator, a university and a municipality. The Mac-OU INC is a partnership between Oakland University (20,000+ student body), Macomb County (2nd largest county in the state), and the City of Sterling Heights (4th largest city in the state). Mac-OU INC resides in a 38,000-sq. ft. facility and focuses on economic development initiatives and high-tech business innovation and growth with specialization in defense, homeland security and advanced manufacturing. Additional industry clients include energy, medical devices, digital health, automotive, special materials, software and information technology.

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Responsibilities:
Oversight and leadership that supports the organization's mission to identify promising technology, grow start-up and early stage technology companies as well as mid-sized companies with new technologies; strategic, business and sustainability planning; policy/procedure/contract oversight & development; marketing, public relations, facilities management, fund raising; metrics collection and reporting; program, training, event and networking development; staff management; stakeholder, partnership and relationship building; business advising and coaching; oversight in assistance to businesses with their employment, internship, training, funding, product development, strategic and commercialization needs.

Significant Contributions:

- Awarded statewide RFP to run the lean training for the Governor's Good Government Program in 2013 & 2014
- Awarded statewide RFP to run the state and nation's first Defense Advanced Research Project Agency (DARPA) match program. Included oversight of research study on national DARPA activity, state-wide training on how to obtain DARPA funds, and a match program for those approved for DARPA funds and those who participated in DARPA challenges
- Creation of on-site partnerships with the Michigan Defense Center and Small Business Development CTR
- Worked with numerous partners to create first Smartzone Cyber range opened to the public in Michigan
- Co-wrote proposal and partner of Michigan Defense Center International Landing Zone
- Developed twenty-person Executive Advisory Council to assist with strategic development
- Secured/administered $4.5 million in federal, state and private grants
- Assisted clients in securing $17.4 million in funds and creating 515 jobs
- Averaged 11 events per month (over 6,000 attendees including Lean training in Black/Green Belt and & startup)
- Created volunteer Business Advisory Board and Business Advisory Mentor program to assist start-ups with their growth needs (70 volunteers with multiple business skills across numerous industries)
- Increased occupancy of facility from 20 to 100%
- Unified and remodeled pricing structures for facility and all services
- Creation of policies, procedures and contracts for all services
- Rebranded organization, which included new website and marketing materials
- Created blog, social media presence, electronic newsletter and list server with over 6,000 contacts
- Public relation efforts resulting in local, regional, state and national media coverage
- Implementation of new CRM software to capture metrics and reporting necessary for stakeholders
- Created programming including: Executive in Residence Program featuring one of the state's largest law firms, monthly Lunch and Launch series, Fireside Entrepreneurial Chat series, Commercialization Panels, Startup Lean, Pitch Prep and monthly Capital Raise Meetups
- Ranked first in state (among Smartzones) for securing Business Acceleration Funds for clients

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- Developed Macomb County's largest pitch competition for technology-based businesses
- Worked with City and County to create annual business start-up awards and recognition
- Research on metric reporting for business incubators and accelerators across the U.S. resulting in reporting changes for state-wide network that reported directly to the governor

AMOSKEAG BUSINESS INCUBATOR (abi), Manchester, - NH - 1997-2010
Founding CEO

Responsible for overall development, management, planning and leadership of the Amoskeag Business Incubator (abi), an organization that promoted growth in early stage businesses. Developed business, marketing, public relations and strategic plans and overall implementation; oversight of staff management and hiring; financial and budget management; policy and procedure development; client pipeline development; facilities management; government, community and partner relations; federal grant and legal compliance; fundraising and development of business support and growth programs including assessment tools; business coaching and consulting to technology, manufacturing and service businesses.

Significant Contributions

- Longest operating business incubator with highest success statistics in the state of New Hampshire
- Over 130 businesses served with an 87% success rate upon graduation. Business participants created and retained over 1,400 jobs and created over $400 million in revenues
- Hosted business workshops, seminars and networking events to educate the public (8,000+ attendees)
- Developed educational network: 1,600 college students from 6 universities/colleges assisted over 70 businesses through internships, class projects and as volunteers
- Founding partner and manager of on-site Small Business Administration (SBA) Business Information Center opened to the public
- Consistent 100% occupancy of 36 offices
- Secured/administered $2 million in federal, state, city and private funds
- Created web-based, "Ask the Monthly Expert" forum in partnership with The New Hampshire Union Leader
- Published monthly electronic newsletter informing public of abi & business client's happenings
- Facilitated monthly CEO Roundtable meetings to encourage knowledge exchange among businesses
- Secured federal funding and established strategic plan to become one of ten international "Soft landing Designated" incubators in the country
- Hosted government leader visits, press events, & roundtables; trade delegations and international visiting groups
- Developed and implemented state-wide business plan competition resulting in new business applicants
- Contributor for two books, "A Practical Guide to Business Incubator Marketing" & "A Practical Guide to Business Incubation"

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- Public relation efforts resulted in significant quotes and contributions to local, regional and national media including speaking engagements for numerous events and venues

Awards & Honors

- 2015 Discotic Award for Science and Technology for Macomb OU INCubator, Corp!
- 2015 Education Excellence Award for Macomb OU INCubator, Best of Mich Business
- 2010 Champion in Action Award for economic development from Citizens Bank and WMUR Television
- 2009 Patrick Johnson Award from Public Relations Society of America for partnerships that better community
- 2009 Outstanding Woman in NH Business Award from NH Business Review & Centrix Bank
- 2006 NH Commendable Company Award from state of NH for evoking entrepreneurial spirit
- 2005 Excellence in Public Service Award in NH from NH Business Review
- 8/12/09 Provided verbal and written testimony before The U.S. Senate Committee and the U.S. Small Business Administration Director, Karen Mills, on small business and entrepreneurship; testimony based on statewide research that I conducted on small business issues and concerns
- Four citations from Governor's office for assisting in business development in the state of NH

Professional Affiliations & Service

Recent:

Advisory board member Michigan Defense Industry Protect and Grow; Advisory member for Michigan Defense Center Research & Development Committee; Stakeholder Macomb Community College Defense and Homeland Security Initiative; Shareholder Michigan Automated Systems Collaborative; Committee member of Oakland University Technology Transfer Office; Partner and committee member of Oakland University Ideas to Business program; Director of Business Advisory Network of Southeast MI (BANSEM); Advisory Director of Professional and Continuing Education at Oakland University; Executive Advisory Council member for OU INC-Smartzone accelerator; Committee member Macomb Community College Innovation Center

Past:

Business Advisory board member for the University of NH, Manchester Community College & Hesser College; Judge, presenter and moderator for International Business Incubator Annual conferences; founding director & treasurer of NH Business Incubator Network; 2010 Governor's Business Roundtable participant; NH High Tech Council committee member; recipient of NBIA competitive scholarship for annual international conference; Judge & planning committee two years for NH Business Plan competition; Governor subcommittee for Latino Business Resources; Economic Development committee for City of Manchester 2002-05; Commissioner for Manchester Transit Authority 2002-05; founding board member of Combinet NH; Families in Transition development committee member; Southern NH University development committee member; Southern NH Planning Commission advisory board; Women's Business Center advisory board; MerchantBanc chair-advisory committee; participant in planning sessions for economic development in Manchester and the state of NH.

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Education & Certificates

- Bachelor of Arts in Economics, Whittemore School of Business, University of New Hampshire, Durham, NH
- Project Management Certificate, Oakland University, May 2015
- Incubator Management Certification, National Business Incubator Association, April 2013
- Startup Lean Certificate, Oakland University, October 2012

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LSI | SOLUTION DEVELOPMENT

Dustin Eatchel

Professional Experience

LSI, Layton, UT 2018 - Present
Graphic Artist / Website Developer Consultant

JC Video Systems, Inc. - Sandy, UT February 2009 – Present
Software Developer / Graphic Artist
Lead Developer in charge of design/coding of industry leading motion analysis software capturing and replaying video footage at more than 2000 frames per second. Lead designer of all corporate branding & marketing efforts including email campaigns and trade show booth design. Lead Web Designer/Developer of websites catering to the golf instruction industry including interactive student profiles, user & login management, accounting and reporting systems, shot tracking software and detailed lesson/clinic scheduling.

Martin Garage Doors - Salt Lake City, UT May 2004 - February 2009
Senior Graphic Artist
Senior Graphic Artist in charge of all marketing materials for use in Home Depot and Lowe's stores across the nation. Created the website for Martin Doors and collateral for company-wide communications.

PaperGarden, Inc. - Cedar City, UT October 2003 - April 2004
Senior Graphic Artist
Senior Graphic Artist responsible for the creation and organization of company literature, website, advertising, show booths, and product lines including a full line of Disney products for the scrapbooking industry.

Cedar Mountain Publishing - Cedar City, UT February 2002 - October 2003
Graphic Artist
Graphic Artist responsible for layout of Scrapbook Premier and Scrapbook Stores Across America, two nationally distributed magazines for the scrapbook industry. Putting together interactive Flash presentations & introductions for the web.

Education

- Graphic Design Major Sept 2000 - June 2002, Southern Utah University - Cedar City
  Recipient of Full Tuition Leadership Scholarship; 3.5 Cumulative GPA; Nominated for The National Dean's List (Fall 2000 Semester)
- High School Degree Sept 1997 - June 2000, Davis High School - Kaysville, UT
  High Honors Graduate (3.8 Cumulative GPA); High Honor Roll 1997-2000; January 2000 Student of the Month; School Newspaper Layout Editor; FCCLA Public Relations Officer

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Skills

- Programming / Development
- C#, XAML, HTML, Javascript Languages
- Windows Presentation Foundation (WPF)
- SOAP/RESTful Webservices
- ASP.NET & .NET Frameworks
- DNN CMS
- Windows Server 2019 / IIS 8.0

Software Expertise

- Adobe Creative Cloud 2020 including Photoshop, Illustrator, InDesign, Premiere Pro, After Effects, and more
- Microsoft Visual Studio & Blend 2019
- Microsoft Office 2020

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LSI | SOLUTION DEVELOPMENT

Harvey Horn

Harvey has more than 30 years of experience in Management Training, Project Management, Process Improvement, Regulatory Oversight, Engineering Management, and Engineering Operations within the Department of the Navy, and now as a private contractor.

Harvey graduated from Penn State University with a BS in Civil Engineering in 1983. He was then hired by Naval Sea Systems Command, Portsmouth Naval Shipyard where he was trained and qualified to direct Naval personnel in the operation, testing, and oversight of reactor plants on nuclear powered submarines. He rose to the position of Nuclear Test Engineering Division Head where he was responsible for the safety of reactor plants on all submarines undergoing maintenance by Portsmouth Naval Shipyard.

Harvey then spent six years as the Deputy Director of Radiological Controls. The Radiological Controls Office provides regulatory oversight of all matters involving radioactivity and radiation at Portsmouth Naval Shipyard.

In 2004, Harvey was given the challenging task of building a team to train, implement, and most importantly build a culture of Lean Process Improvement at the Portsmouth Naval Shipyard. Development of this culture required an understanding of the human elements of what motivates people and how work is accomplished. Over the next few years, Harvey completed qualification as a Lean Six Sigma Black Belt and personally trained more than 2000 members of the workforce, including the newest hires, mid-level management, and the Shipyard Commander. Many of the process improvement initiatives developed at Portsmouth during this time have now been adopted at all Navy maintenance facilities.

Harvey's ability to understand and communicate with people at all levels led to his frequent participation in Alternate Dispute Resolution panels and as an independent investigator into Equal Employment Opportunity cases.

Harvey concluded his career with at Portsmouth Naval Shipyard as a Project Superintendent responsible for the management of the majority of work performed by Portsmouth Naval Shipyard for the Naval Supply System in support of entire US Navy Submarine fleet.

In addition to his work with Optimize and Tandem Training Incorporated, Harvey assists the Workforce Development Office of Manchester Community College in outreach to companies in New Hampshire, helping them identify training needs and potential training funding streams, setting up the training program, and delivery of the training, whether it be delivered by Tandem Training or other entities.

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Randy Mahr

Executive Consultant

Provides management, leadership and technical consulting business to help companies of all sizes, in the aerospace and defense sector. His expertise includes managing a variety of complex, high risk, turnaround projects.

Professional Experience

LSI

Mahr Citadel Solutions, LLC: President: Jan 2017 – Present
Maryland, USA
Providing management, leadership and technical consulting services to businesses across the United States. Capabilities include data synthesis, project management, risk management, communications and presentation coaching, and process analysis. Mahr Citadel Solutions, LLC, is a Veteran-owned Small Business. We will consider selective strategic partnerships.

KW: aerospace, aviation, capture, change management, communication, consulting, defense, leadership, government, management, market, program, risk management, small business, speaker, strategic planning, strategy, veteran

Dayton Aerospace. Inc, Associate: Feb 2017 – Present
Dayton, Ohio Area
Providing senior-level strategic planning, business capture, change management, process improvement, and program execution support to government and industry customers across all phases of the weapon system life cycle.

Rear Admiral
July 2010 – Jan 2017
Global

Naval Flight Officer
1983– 2016
Global
Commissioned an Ensign in 1983 I was winged as a Naval Flight Officer in 1984 and proceeded to fly as an A-6 Bombardier/Navigator in the A-6E Intruder all-weather carrier-based attack aircraft. I deployed with VA-95 and VA-115 aboard USS Enterprise (CVN 65), USS Midway (CV 41) and USS Independence (CV 62), and served with VA-128 and Medium Attack Weapons School Pacific, along with various other commands. I accumulated over 2,000 flight hours in various aircraft types and over 550 carrier-landings ("traps"). In 1994 I was redesignated an Aerospace Engineering Duty Officer (AEDO) following the end of the A-6E community. From that time I served in various Navy and Air Force acquisition commands as the test & evaluation lead, project and program management and engineering roles.

Deputy Program Executive Officer
F-35 Lightning II Joint Program Office

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Nov 2012 – Nov 2016
Crystal City, Arlington, VA
Executive program management for all aspects of the F-35 Lightning II fighter aircraft program. We acquire and support, for the world's air forces, an aircraft system that prevents aggression against friends and innocents, and provides accurate, lethal, force wherever and whenever needed, so good men and women can go home to their families at night. By the time I left there were over 175 operational F-35s flying for 7 countries. Excellent videos can be found online by searching RIAT F-35 2016.

Commander, Naval Air Warfare Center Aircraft Division
U.S. Navy
Sep 2010 – Nov 2012
Patuxent River, Maryland
Naval Air Warfare Center Aircraft Division conducts research, development, acquisition, test & evaluation of naval aircraft and associated weapon systems and rapid acquisition for DoD and government agencies. 13,000 military and civilian employees executing an annual budget exceeding $3.0 billion, with facilities in Orlando, FL, Patuxent River, MD and Lakehurst, NJ.

Assistant Commander, Research and Engineering
Naval Air Systems Command
Sep 2010 – Nov 2012
Patuxent River, MD
Chief Engineer for the Naval Air Systems Command managing 9,000 civilian and military technical personnel across 9 centers in the U.S. for naval aircraft and associated weapon systems.

Program Manager
Naval Aviation Programs
2005 – 2010
Managed two high visibility US Navy and international programs for E-2 Hawkeye/C-2 Greyhound and all Aircraft Launch and Recovery Equipment programs, including catapults, arresting gear, visual landing aids, aerographic equipment, expeditionary airfield support, etc. High profile programs included the E-2D and subsequently the Electromagnetic Aircraft Launch System (EMALS) for the US Navy's newest aircraft carrier, CVN 78 USS Gerald R. Ford. Responsible for decisions on every aspect of the projects from budgeting to spares, and to deliver products on schedule with needed performance.

Vice Commandant
U.S. Air Force
Apr 2001 – Jul 2004
Wright Patterson AFB, Dayton, OH
Deputy Program Manager for a joint research program between U.S. Navy and Air Force Research Laboratory (AFRL) tasked to transition various research projects from laboratories to be ready to field in U.S. aircraft and weapon systems. Worked for two years with all major U.S. aerospace industry companies, both airframe and engine to identify key technologies ready for production. In 2003, after completing a comparative analysis of post-graduate education between the U.S. Navy and U.S. Air Force at the direction of the Secretaries of the two Services, I was selected to be the first U.S. Navy officer to be the Vice Commandant of the Air Force Institute of Technology

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(AFIT). There I integrated the initial cadres of Navy and Marine Corps post-graduate students, and was responsible across AFIT for physical infrastructure, and coordination with the various academic.

Education

U.S. Naval Postgraduate School
M.S.
Aerospace Engineering
1999 – 2001

U.S. Naval Academy
B.S.
Systems Engineering
1979 – 1983

NDU

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LSI | SOLUTION DEVELOPMENT

Herb Ueda

Professional Experience

Program Analyst | CACI/ORBIS | 2015-Present

Mentored organizations at Portsmouth Naval Shipyard. Coordinated performance coaching program at Puget Sound Naval Shipyard.

Environmental, Safety, and Health Director | Portsmouth Naval Shipyard | 2008-2014

Led 60 ESH professionals managing the environmental, safety, and health program for Navy ship repair activity of over 5,000. Reported to Shipyard Commander and served on Executive Board in charge of operational and strategic management of shipyard.

Shipyard Manager | Portsmouth Naval Shipyard | 1997-2008

Managed, led, and improved organizations across a wide range of naval shipyard functions including:

- Nuclear Facilities
- Quality Assurance
- Lifting and Handling
- Nuclear Testing

Volunteer Experience

- Habitat for Humanity
- Christian Emergency Response
- transportation Assistance for Seacoast Citizens

Skills

- Helping organizations improve performance through leadership, teamwork, and employee engagement

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Major General Robert McMahon (Ret)

Senior Executive Consultant

Maj. Gen. (Ret) Robert H. McMahon Commander, Warner Robins Air Logistics Center, Air Force Materiel Command, Robins Air Force Base, Georgia. He was responsible for worldwide logistics support for C-130 and C-5 transport aircraft, F-15 fighter aircraft, U-2 reconnaissance aircraft as well as support for remotely piloted vehicles, Air Force helicopters, air-to-air missiles, surface motor vehicles and high-technology airborne electronics, avionics and electronic warfare requirements. Other responsibilities included comprehensive logistics support and sustainment for the E-8C Joint STARS and the C-17 transport aircraft. The center is one of three Air Force air logistics centers and the largest single-site industrial complex in the state of Georgia.

Born in Toledo, Ohio, General McMahon entered active duty after graduation from the U.S. Air Force Academy in 1978. He commanded a maintenance wing, a logistics group and two maintenance squadrons. He was the Director of Maintenance and of Aircraft for the Ogden Air Logistics Center and as the Director of Propulsion for the San Antonio ALC. He was the military assistant to the Assistant Secretary of the Air Force for Installations, Environment and Logistics, Headquarters U.S. Air Force. He has also served as Director of Maintenance, Deputy Chief of Staff for Logistics, Installations and Mission Support, Headquarters U.S. Air Force. Prior to his current position he served as Director of Logistics, Deputy Chief of Staff for Logistics, Installations and Mission Support, Headquarters U.S. Air Force.

Education

- 1978 Bachelor of Science, International Affairs, U.S. Air Force Academy, Colorado Springs, Colorado
- 1981 Squadron Officer School, Maxwell AFB, Alabama
- 1986 Master of Science, Maintenance Management, Air Force Institute of Technology, Wright-Patterson AFB, Ohio
- 1990 Air Command and Staff College, Maxwell AFB, Alabama
- 1994 Air War College, Maxwell AFB, Alabama
- 1999 Advanced Program Management Course, Defense Systems Management College, Fort Belvoir, Virginia
- 2001 National Security Management Course, Maxwell School of Citizenship and Public Affairs, Syracuse University, New York

Assignments

- **Student**, Aircraft Maintenance Officer Course, Chanute AFB, Illinois
  - July 1978 - December 1978
- **Officer-In-Charge**, Avionics Branch, 355th Tactical Fighter Wing, Davis-Monthan AFB, Arizona
  - January 1979 - July 1979
- **Officer-In-Charge**, 60th Aircraft Maintenance Unit, 33rd Tactical Fighter Wing, Eglin AFB, Florida

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  - **Officer-In-Charge,** Avionics Branch
    - August 1979 - July 1982
- **Maintenance Supervisor**, 21st Equipment Maintenance Squadron, 21st Tactical Fighter Wing, Elmendorf AFB, Alaska
  - **Officer-In-Charge**, 43rd Aircraft Maintenance Unit,
    - August 1982 - May 1985
- **Student**, Air Force Institute of Technology, Wright-Patterson AFB, Ohio
  - May 1985 - September 1986
- **Member**, Commander's Action Group, Headquarters Tactical Air Command, Langley AFB, Virginia
  - **Chief**, Logistics Information Systems Branch
    - September 1986 - July 1989
- **Student**, Air Command and Staff College, Maxwell AFB, Alabama
  - July 1989 - June 1990
- **Maintenance Supervisor**, 325th Aircraft Generation Squadron, Tyndall AFB, Florida
  - **Officer-In-Charge**, Maintenance Operations Division
    - July 1990 - May 1991
- **Commander**, 325th Maintenance Squadron, Tyndall AFB, Florida
  - **Commander**, 325th Component Repair Squadron
    - May 1991 - July 1993
- **Student**, Air War College, Maxwell AFB, AK
  - July 1993 - June 1994
- **Chief**, Maintenance Policy Division, Headquarters U.S. Air Force, Washington, D.C.
  - **Chief**, Pollution Prevention Policy
    - June 1994 - July 1995
- **Commander**, 35th Logistics Group, Misawa Air Base, Japan
  - July 1995 - April 1997
- **Director and System Support Manager**, Propulsion Directorate, San Antonio ALC, Kelly AFB, Texas
  - **Special Assistant to the Commander**
    - April 1997 - April 2000
- **Director**, Aircraft Directorate, Ogden ALC, Hill AFB, Utah
  - April 2000 - September 2001
- **Senior Military Assistant**, Assistant Secretary of the Air Force for Installations, Environment and Logistics, Headquarters U.S. Air Force, Washington, D.C.
  - September 2001 - February 2003
- **Director of Maintenance**, Ogden ALC, Hill AFB, Utah
  - March 2003 - February 2005
- **Commander**, 309th Maintenance Wing, Hill AFB, Utah
  - February 2005 - August 2005
- **Director of Logistics**, Headquarters Air Mobility Command, Scott AFB, Illinois
  - August 2005 - November 2007
- **Director of Maintenance**, Deputy Chief of Staff for Logistics, Installations and Mission Support, Headquarters U.S. Air Force, Washington, D.C.
  - December 2007 - October 2008
- **Director of Logistics**, Deputy Chief of Staff for Logistics, Installations and Mission Support, Headquarters U.S. Air Force, Washington, D.C.

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  - October 2008 - November 2010
- **Commander**, Warner Robins Air Logistics Center, Air Force Materiel Command, Robins AFB, Georgia
  - November 2010 - Present

Major Awards and Decorations

- Distinguished Service Medal with two oak leaf clusters
- Defense Superior Service Medal
- Legion of Merit with two oak leaf clusters
- Meritorious Service Medal with four oak leaf clusters
- Air Force Commendation Medal
- Air Force Achievement Medal

Effective Dates of Promotion

- Second Lieutenant, May 31, 1978
- First Lieutenant, May 31, 1980
- Captain, May 31, 1982
- Major, December 1, 1988
- Lieutenant Colonel, April 1, 1992
- Colonel, Oct. 1, 1996
- Brigadier General, February 1, 2004
- Major General, August 1, 2007

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Mikel C. Myers, Senior Consultant

Professional Background

Mikel Myers has over 31 years of experience in the Naval overhaul industry specializing in Submarines, Mikel also served 6 years in the US Army. His accomplishments have ranged from working in industrial shops to implementing specialized projects. He has spent the last 10 years training and implementing Lean Manufacturing and Six Sigma concepts on the shop floor as well as in front office workspaces.

- He has strong organizational, analytical, and communication skills. Knowledgeable in computer applications using database, spreadsheet, word processing, flow charting, and various other programs. He has obtained a Bachelor's degree in Management Information Systems and an Associate's degree in Business Management. He is an ASQ certified Six Sigma Black Belt with qualifications to train green belts and has trained and certified more than 20(?) green belts resulting in more than 100(?) successfully completed projects. He Facilitated Lean Six Sigma overview instruction certifying hundreds of Yellow Belts.

Experience

- As a Senior Consultant with optimize, Inc., he is involved in the Plan, Standardization & Sustainment for the Knowledge Sharing, Resources and Risk Mitigation Processes.

- As a member of the Industrial Engineering Team in the Shipyard Commander Process Improvement Office, he facilitated and managed:
  - Critical Rapid Improvement Events (RIE) including: End Game acceleration, Compartment Closeout first pass yield
  - Major cost saving technology insertion Projects – RFID & Thermal Imaging for productivity enhancement of Shops, Vending Machine Issue and control of time sensitive Weld Wire
  - Value Stream Analysis (VSA) – Execution Priorities, Light Weight Wide Aperture Array
  - Supplier integration (Advanced Installation Teams (AIT) Integration of Ship Alts) into the overhaul Project Team and Project Plan

- He lead the Implementation of:
  - Tracking of work instruction packages and materials utilizing Radio Frequency Identification (RFID)
  - Point of use consumable material and low-cost tools utilizing Vending Machines
  - Shipboard Productivity Initiative utilizing Thermal Imaging Technology

- As the Business Agent in the Business and Strategic and Planning Office, he was the primary contact, liaison, and negotiator between the Shipyard its customers

- As the Project Engineering and Planning Manager in the Engineering and Planning Department he - Managed Design Engineering's efforts for the first Reverse Osmosis installation onboard a submarine

- As the Smart Base Program Manager, in the Business Office he was responsible for introducing new commercial off the shelf Technologies:
  - Automated Access Control System - Proximity card implementation at four Naval shipyards
  - Smart Procurement Electronic Data Interchange - Electronic material ordering

- Energy Saving Performance Contract - Upgrade infrastructure and saving energy
- Wireless Fleet Management System - Automated vehicle tracking

- Mikel is a member of:
  - Department of Navy, American Society for Quality Lean Six Sigma
  - Department of Navy, Lean Six Sigma
  - Member of the Naval Civilian Managers Association

- Core Competencies
  - Operational Excellence Assessment & Benchmarking
  - Interpersonal Skill Development - Dale Carnegie
  - Enterprise Transformation
  - Supplier Development and Supply Chain Integration
  - Contractor Officers Representation
  - Innovation, Lean, Six Sigma & Compliance Systems
  - Research & Development
  - Technology Transition & Commercialization
  - Customer/Industry/Government Relations
  - Program, Project & Account Management

- Formal Education
  - BS degree in Management Information at New Hampshire College, Portsmouth, NH, 01/1989
  - BA degree in Business Management at McIntosh College, Dover, NH, 05/1982

- Continuing Education
  - Department of Navy, American Society for Quality Lean Six Sigma Black Belt, 04/2007
  - Department of Navy, Lean Six Sigma Black Belt, 11/2005
  - Microsoft Excel, Power Point, Outlook and Word for Windows 05/2001
  - Contractor Officers Representative, 08/2000
  - Benchmarking Skills, 12/1996
  - Dale Carnegie, 02/1990

- Awards
  - Sustained Superior Award, 06/1983, 12/1984, 11/1988, 11/1990, 11/1991, 12/1993, 10/1996
  - Beneficial Suggestion of the Month, 12/1986
  - Special Recognition, 04/1987, 04/1999
  - On The Spot Awards, 08/2001, 11/2006, 03/2007, 05/2008, 10/2008, 03/2009
  - Dover Recreation Advisory Board (11 years), 02/1995 - 02/2006

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801.776.0062 ▪ www.lsiwins.com

LSI | SOLUTION DEVELOPMENT

Walter D. Rawle, PhD

Highly accomplished strategist, technology leader, and business development professional; applied researcher, inventor, and classically educated electrical engineer; earned doctorate with over 35 years of outstanding business, research, program execution, and product development experience. A unique combination of strong business and program management ability, in-depth analytical acumen and theoretical foundation, and strong leadership coupled with common sense hands-on engineering approach to complex problem solving. Successful program capture and execution for a wide variety of commercial, government, and military customers. Work experience areas include unmanned systems; sensor fusion, machine learning, knowledge extraction; computational intelligence and CBM/PHM/HUMS systems; military communications, navigation and surveillance avionics; conventional and trunked communications systems; homeland security technologies; and Part 15 consumer products.

Summary of Experience

- Strategy & technology leadership: Stakeholder engagement; Research opportunity identification and funding analysis; Research proposal development and management; Research program pursuit and capture;
- Research program management and execution: Resource and facility planning. Research program metrics evaluation. Technology transition assessment
- Research program engineering: Requirements development and management, trade studies, scope and resource analysis, change negotiation.
- Unmanned systems/aerospace engineering: Mission planning; aerostructures analysis; propulsion analysis; sensors and systems integration; communications, surveillance, navigation design; payload data acquisition, storage, analysis, and download; battery management systems design; FAA Part 107 compliance.
- Data analytics: machine learning, computational intelligence, probabilistic and data driven algorithmics; prognostics, health management. and health and usage monitoring systems; unmanned systems (LIDAR) data analysis and knowledge extraction.
- Software Engineering: DevOps/toolchain implementation, DO 178 process, object- oriented paradigm, SQA. Source code: C/C++, Python, HTML, SQL, Matlab/Octave
- Hardware/mechanical design: HW/mechanical design execution: RF/microwave, analog, digital, embedded software, - Antennas, multicouplers, switches, power amplifiers, transmitters, receivers, DSP and voice encoding/encryption, power supplies, digital and analog tone control links, TCP/IP.

Professional Accomplishments

General Dynamics Ordnance and Tactical Systems (2019-present)

- Senior Principal Systems Engineer: Subject matter expert and product support for full spectrum of GD-OTS products – sea, land, and air ballistic missile defense and air armament systems.

Oxford Analytics LLC (2019 – present)

- Founder and Chief Technology Officer: Select clientele across multiple industries. Subject matter expertise: disruptive technologies, research commercialization trends, analysis, positioning; emerging technology business opportunity analysis; research data analytics

Ultra Electronics Flightline Systems (2012-2018)

- Director, Advanced Projects and Research: Emerging technologies strategic analysis, government relations, stakeholder management and program development, proposal preparation, subject matter technology expert, technology transition program support, systems architecture and engineering. Successful deliveries to Airbus. KAI, and various military organizations.

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Goodrich Corporation (2010-2011)

- Technology leader for multi technology Sensors and Integrated Systems business unit: Theoretical, analytic, business development, research management, engineering, and domain experience contributions across all strategic Goodrich SIS product areas.

GE Global Research (2008-2010)

- Senior Research Engineer: Theoretical, analytic, engineering, and domain expertise contribution for successful project and proposal deliveries to multiple military, government, and internal GE customers.

GE Aviation (2005-2008)

- Technology Lead: Business development, project management, process, systems engineering and technical analysis for successful deliveries for Bell Helicopter, Boeing, and Lockheed Martin.

Applied Marine Technology Inc (2003-2005)

- Business development, program management, systems engineering, HW/SW design engineering, and test development functions to successful deliveries for US DHS, US Army, US Coast Guard, US Marine Corps, US Navy, US Secret Service, DTRA, TSWG, BAE Systems, and Harris Corporation.

CMC Electronics (2002-2003)

- Business development, program management, systems engineering, HW/SW design engineering, and test development functions to successful deliveries for NASA Edwards, JPL, ONR, NRL, Lockheed Martin, Orbital Sciences Corp, and Raytheon

Ericsson Inc. (1996-2002)

- Consulting Systems Engineer: Systems engineering, HW/SW design engineering, test engineering and supply chain management functions resulting in multiple successful customer deliveries.

Professional & Academic Affiliations/Patents

- University of Maine, Faculty of Graduate Studies, External Faculty Appointment
- University of Maine, PhD Student Advisory Committee, Dr. Ali Abedi, Faculty Advisor
- Institute of Electrical and Electronics Engineers, Senior Member, Chair, Maine Section, Vice Chair IEEE USA Congressional Advisory Committee Aerospace and Transportation Policy, Member IEEE USA Congressional Policy Committee, Artificial Intelligence and Autonomous Systems, Member, HKN Honors Society, Member, Antennas and Propagation Technical Society, Member, Aerospace and Electronics Systems, Technical Society, Member, Industrial Applications Society.
- American Helicopter Society, Avionics and Mission Systems Technical Committee: Technical Chair and Session Technical Chair
- New Hampshire Aerospace and Defense Export Consortium: Member, Board of Directors; Chair, Unmanned Systems Committee.
- U.S. PATENT 8.301,332 B2 “Method and System for Fleet Operations Data Management”, October 30, 2012.
- U.S PATENT 6,546,236 B1 “Phase Compensating Polarization Diversity Receiver” April 8, 2003
- U.S. PATENT 6,078,295 A “Tri-band Antenna”. June 6, 2000

Education

- PhD, Electrical Engineering, University of Manitoba, Winnipeg MB
- MASc, Electrical Engineering, Technical University of Nova Scotia, Halifax NS
- BEngEE, Electrical Engineering, Technical University of Nova Scotia Halifax NS

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LSI | SOLUTION DEVELOPMENT

Garry B. Richey

Professional Experience

LSI - Independent Consultant
May 2011 - Current

- Provides insight and strategy for defense related businesses, both large and small, in support of sustainment activities for the U.S. Department of Defense. Consults with senior DoD officials regarding organizational issues, supply chain strategies, acquisition issues and performance improvement opportunities. Serves as keynote speaker for conferences and training events with topics focusing on leadership, strategy and team building. Performs acquisition support for defense companies seeking DoD contracts to include strategy development, RFI and RFP responses and Color Team reviews and analysis.

Director of Logistics, Installations and Mission Support
HQ Air Education and Training Command, Randolph AFB, TX

July 2007 - April 2011

- Responsible for aircraft maintenance, supply, transportation, contracting, civil engineering, and security forces support for 13 flying wings and training wings. Direct supervision of ~400 staff, including eight Colonels. Oversaw AETC weapon system support (Contractor Logistics Support, Depot Program Equipment Maintenance, Sustaining Engineering, Tech Orders, etc), with annual expenditures of ~$600M. As the AETC Acquisition Services Advocate, responsible for oversight of contract awards totaling $1.2B annually. Served as Source Selection Authority for large acquisitions up to $500M in support of AETC bases.

Executive Director, Oklahoma City Air Logistics Center, Tinker AFB, OK
August 2004 - July 2007

- Senior civilian on the installation, responsible for assisting the Commander in providing worldwide logistics support for assigned weapon systems, including the KC-135, E-3, B-1, B-52, B-2, and the USAF jet engine fleet. Responsible for supervision of four large directorates and numerous staff offices with an employee population of over 17,000. Oversight of depot maintenance and supply chain budgets totaling over $5 Billion.

Deputy Director of Logistics, HQ Air Mobility Command, Scott AFB, IL
April 2003 - August 2004

- Principal deputy to the Director and advisor to the AMC Commander and senior staff in all logistics matters. Responsible for executing policy, budget and oversight of AMC's maintenance, supply, contracting and transportation activities. Directed AMC's logistics personnel worldwide, supporting over 1,600 mobility aircraft with a budget of $2.9B.

Deputy Director of Logistics for Supply Management
HQ Air Force Material Command, Wright-Patterson AFB, OH
September 1999 - April 2003

- Responsible for the Materiel Support Division of the Supply Management Business Area, a $4.2B stock fund. Directed a wide range of logistics services: requirement determination, spares acquisition, provisioning, cataloging, disposal and implementation of Supply Chain Management throughout AFMC. Provided supply support policy, guidance and direction to air logistics

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centers, operational wings and USAF worldwide customers.

Director of Commodities Management
Oklahoma City Air Logistics Center, Tinker AFB, OK
July 1997 - September 1999

- Responsible for over 40,000 aircraft and engine accessories, instruments and inertial navigation items valued at $4.5B. Managed close to 2,000 employees and an annual budget exceeding $500M. Responsible for industrial operations comprising two million man-hours of production generating more than $200M in revenue annually.

(Special Assignment) Proposal Manager, USAF bid team
Propulsion Business Area, Tinker AFB, OK
March 1997 - February 1999

- Served as Proposal Manager for the USAF's bid for the San Antonio Air Logistics Center propulsion business area (PBA) public/private competition. The PBA was awarded to the Oklahoma City ALC in February, 1999, valued at more than $10B, and is the largest contract of its type ever awarded by the USAF. Led a multi-discipline, government-industry team to develop the winning proposal to provide depot maintenance for key USAF weapon systems for 15 years, with savings estimated at $1.8B.

Deputy Director of Propulsion
Oklahoma City Air Logistics Center, Tinker AFB, OK
May 1993 - July 1997

- Provided logistics management support, depot maintenance, and engineering support for an inventory of over 13,000 jet engines supporting 12 major commands at 150 USAF bases and 45 foreign military sales nations. Managed annual expenditures in excess of $700M, inventories valued at more than $15B, and facilities and equipment valued in excess of $386M. Supervised approximately 2,000 employees.

Deputy Chief, Contractor Logistics Support (CLS) Systems Division
Oklahoma City Air Logistics Center, Tinker AFB, OK
April 1989 - April 1993

- Responsible for management of USAF CLS Supported Aircraft. Managed an annual budget of over $500M and a staff of 150 employees.

Education

1977 Bachelor's Degree - Speech Communication, Oklahoma University
1998 Master's Degree - Management, Webster University
2000 Program for Senior Managers in Government, Harvard University
2002 Program for Executives in Logistics & Technology, North Carolina University
2003 National Security Studies Leadership Program, Syracuse University

Awards and Honors

1996 AFMC Sustainment Logistics System Support Manager of the Year
1998 Exemplary Civilian Service Award
2002 Meritorious Executive Presidential Rank Award
2007 Distinguished Executive Presidential Rank Award
2011 Outstanding Civilian Career Service Award

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Professional Memberships and Associations

1989-1992 Chairman, Board of Trustees, Hillsdale Free Will Baptist College
1999-2002 AFMC/AFGE Labor Management Partnership Council
2004-2007 Board of Directors, United Way of Central Oklahoma
2004-2007 Board of Advisors, Price College of Business, University of Oklahoma
2004-Present Aviation Advisory Board, University of Oklahoma
2008-2011 Senior Civilian Advisor to the National Logistics Officers Association

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