

# POWERING GROWTH

ANNUAL REPORT 2021

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# Seizing Opportunities Today, Soaring Together Tomorrow

**AS OUR INDUSTRY CONTINUES TO EMERGE AND RECOVER** from a protracted shutdown, it seems there is an incessant stream of initiatives intent on tinkering at the margins. As that happens, investments by the NAMA Foundation are ensuring that NAMA is equipped with industry-specific educational materials and data to tell our industry's story — to lawmakers, regulators, and increasingly to the labor force and the public.

As a result of Foundation-funded initiatives, NAMA has timely and credible data on how the pandemic has impacted the convenience services industry, the trends it has accelerated and the potential pathways to recovery. Together, this tool and these data resources have already saved hundreds of jobs and informed many conversations with policymakers.

Finally, it should be a great source of pride to all who contributed to the NAMA Foundation, that it delivered an expanded number of scholarships when most needed by operators eager to attend *The Together in 2021 Show*.

We still have some time before our industry is whole again. Until then, the NAMA Foundation — through your contributions — is helping NAMA secure opportunities today so we can all soar tomorrow.



**Josh Rosenberg**

Threeboysstrong Business Consulting  
Chair, NAMA Foundation Board of Trustees

# QUANTIFYING

## Industry & Pandemic Impacts

### Regulatory Assessment Model

In Q1, the Foundation funded a Regulatory Assessment Model (RAM) which provides the ability to determine financial and employment impacts that proposed policy changes would have on the industry.

Thanks to this design, NAMA can better educate government decision makers on the exact impacts of their proposed actions. Conversely, the RAM can also be used to demonstrate economic and job growth as a result of implementing favorable tax and regulatory policies.

### NAMA has successfully used this tool to:

- ✓ Calculate the \$193 million impact of eliminating the Employee Retention Tax Credit (ERTC). This data was used for advocacy through a NAMA-created business coalition and during the annual DC Fly-In & Advocacy Summit.
- ✓ Demonstrate the negative impact on jobs that would result from sunseting New York State's vending sales tax exemption.
- ✓ Assess the impact of potential changes to Colorado's sales tax exemption and the Texas one-cent per-container beverage tax.

# CONDUCTING

## Comprehensive Analysis

### Biennial Industry Census

Aligned with its mission to provide industry research that amplifies NAMA's advocacy efforts, the Foundation continued its long-term partnership with Technomic to conduct the comprehensive biennial industry census.



The 2020 Census provided much-needed analysis on industry size, pandemic impacts and projections on recovery by sector.

This data proved to be a timely resource for use in NAMA's conversations with lawmakers and policymakers throughout the year.



Proportion of operators in more than one business segment.

63%



Industry revenue driven from traditional vending.

80%



Office Coffee Service and Pantry Services were the hardest hit by the pandemic.

**By  
2023**

Operators remain optimistic on a recovery to 2019 industry levels by 2023, driven by Micro Markets.

# CREATING

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## Beneficial Solutions

### Continuing Partnerships to Elevate Industry Success

The NAMA Foundation's two-year Cooperative Research and Development Agreement (CRADA) with the U.S. Department of Energy (DOE) has focused on finding business-tenable solutions to create more energy-efficient refrigerated vending machines. The CRADA concluded at the end of 2021. But, the work is not done.

The NAMA Foundation is working with the DOE to extend the CRADA focusing on development of affordable tech solutions.

#### The CRADA Extension will focus on:

- ✓ Designing machinery that out-performs energy efficiency expectations.
- ✓ Developing affordable refrigerant safety sensors and leak disbursement technology.



*The extended partnership between NAMA and DOE will provide solutions to manufacturers as they develop machines that meet new regulatory requirements and will inform NAMA's transformative advocacy efforts to position convenience services as a leader in sustainability.*

# EDUCATING

## Operators & Future Technicians

### Access Through Scholarships

In a challenging environment and at a crucial time, the NAMA Foundation continued to find unique ways to provide value and to educate operators.

In response to the significant financial impacts and in line with the Foundation's knowledge mission, the 5-for-5 scholarship program provided an opportunity for over 10 operators to attend *The Together in 2021 Show*.



### Partnering for Career Development

Since 2015 the Foundation has partnered with the A. Philip Randolph School's Vending Technology Program in Philadelphia to provide scholarships for a select group of its high school students to attend The NAMA Show and the DC Fly-In & Advocacy Summit.

A generous five-year commitment by PepsiCo has allowed the NAMA Foundation to expand the program to cover all costs for six students to attend NAMA's annual events. The program has also been enhanced to add more professional development opportunities for the students.

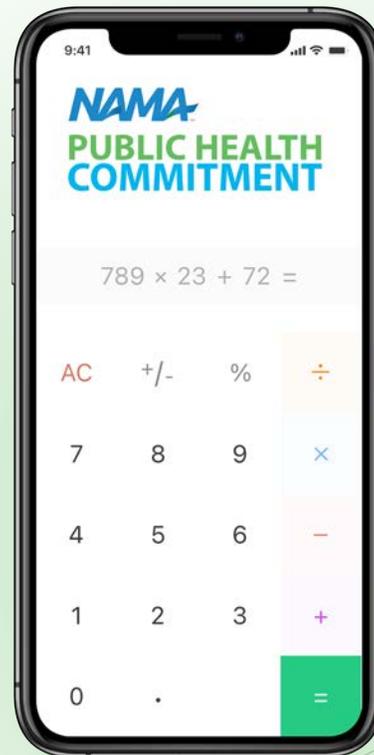
# FORGING

## a Promising Future

### Online Calculator

Working with Keybridge, the data aggregator for NAMA's Public Health Commitment (PHC), technical work has begun to create an online calculator assisting food and beverage manufacturers and operators in easily identifying PHC-compliant products.

*Completion of the online calculator is expected during 2022.*



### Special Events

Special events continued to be a successful fundraising activity for the Foundation, helping to supplement and diversify support while adding an element of camaraderie and fun.



In March, the Foundation hosted **Haunting on the Bayou — a New Orleans Virtual Ghost Tour livestream**. With a focus on the “Together in 2021” theme for The NAMA Show in the host city of New Orleans, registered attendees were given an exclusive tour of the most haunted sites in the Crescent City from the comfort of their homes.

# THANK YOU

## For Your Support

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\* Also Visionary Circle

\*\* Also Presidents Circle

† Also Friends Circle

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GES

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#### Presidents Circle | \$5,000+

A.H. Management Group, Inc.

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Canteen of Coastal California

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SR Strategy

**Thank you to all the other donors who support the annual fund. For a complete list, visit [namanow.org/foundation](http://namanow.org/foundation).**



Contact us to learn more about how the NAMA Foundation helps your business and how you can support its work.

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For detailed information on how the Foundation advances strategic support of voice, knowledge and research in the convenience services industry, visit: [namanow.org/foundation/](http://namanow.org/foundation/)