

AISLE BY AISLE REFLECTIONS ON 2013





January, 2014

Dear FMI Family,

The literary classic, *Canterbury Tales*, is Geoffrey Chaucer's ingenious compilation of stories told by a band of pilgrims journeying together to Canterbury. Chaucer's travelers had a shared objective, but each had his own particular and very different tale to tell. Likewise, the following pages relay the story of FMI's common mission in 2013, but each participant has his or her own perspective to contribute. Every member of your FMI staff was headed to the same destination – that of making FMI the most effective advocate for you and the food retail industry – but the story each tells provides a little different piece of the saga that was 2013.

I invite your scrutiny of the opportunities seized and the challenges confronted in this eventful year, as together we look in the rear-view mirror and reflect on 2013. From the tales we share, you will see that FMI has made significant progress in implementing our now one year old strategic plan. We have sought in this review to make our 2013 travelogue as easy as possible for you by offering various paths to the information. For those who want a quick trip, each department has created a no-frills executive summary offering a bullet-points shortcut to the heart of the matter. For those who enjoy a more elaborate prose tour, there are paragraphs that go into greater detail about the various ups and downs, ins and outs of 2013. Finally, for those who prefer having all the benefits of a trip without having to leave home, each category has a helpful list of new resources produced in 2013. The resource list compiles – department by department – all the research publications, webinars, white papers, regulatory testimonies, issue talking points and additional resource materials that FMI has produced for you this year. While perhaps not quite as saucy as some of Chaucer's tales, together each department's description of accomplishments and produced materials tells the story of FMI's trek through 2013.

If you are more visually inclined and just want to see the sights, I invite you to experience the video version of our end-of-year reflections. This five minute recap provides a graphic highlight reel of FMI's endeavors, events and experiences this past year. You will find the *2013 Aisle by Aisle Reflections* video on the FMI website, www.fmi.org.

My FMI colleagues join me in thanking you for the support you have provided in 2013. It was your participation, encouragement and engagement that gave us a tale worth telling this year. Thank you for that. We look forward to the new stories that will emerge from our shared adventures as we travel together in 2014.

Warm regards,

A handwritten signature in black ink that reads "Leslie".

Leslie G. Sarasin
President and Chief Executive Officer

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Government and Public Affairs

CONTACT: Jennifer Hatcher jhatcher@fmi.org

Executive Summary

- Enhanced CEO participation in government relations and public affairs, increasing the industry's ability to influence legislators and regulators.
- Provided greater regulatory and compliance support to members.
- Increased involvement in state and local government relations efforts.
- Enhanced member awareness of FMI's GR activities.

Enhanced ability to influence legislators and regulators

A key component of this goal is to encourage greater CEO involvement. FMI laid the groundwork for enhancing CEO participation in several ways:

- Held a well-received educational session at Midwinter on increasing influence with legislators, led by the head of the Congressional Management Foundation.
- Encouraged and supported store/distribution center visits by Members of Congress in their congressional districts to bring attention to the issues surrounding health care.
- Took the Public Affairs Committee to visit with the Secretary of Agriculture during the October Board meeting to see firsthand the difference between regulatory influence and congressional influence.



(Left to Right): Liz Chace-Marino, senior manager, government affairs, Ahold USA; House Majority Leader Eric Cantor (R-VA) and Tom Cormier, director, government affairs, Ahold USA during an FMI-hosted fundraiser for FMI G.R. Committee member Israel O'Quinn, director of government affairs for K-VA-T Food Stores, Inc. who serves dual roles as a Delegate in the Virginia House of Delegates (5th District).

- Hosted a training session (saved as a webinar) on influencing the regulatory process.
- Encouraged CEO participation in FMI's Day in Washington fly-in or an alternative day on the Hill for those with conflicts.
- Coordinated FMI Executive Committee meeting with the 2014 Day in Washington to facilitate increased CEO visits to the Hill.

FMI hosted 12 political events on Capitol Hill in 2013 to thank Congressional food retail industry champions and supporters and to further develop the FMI brand on Capitol Hill. FMI enhanced the strategic use of LEAD funds for coalitions, technical expertise, radio and print ads and sponsorships.

Greater regulatory and compliance support to members

FMI offered members ten compliance webinars, dozens of regulatory and compliance alerts, 21 sets of comments on proposed rules or guidance documents with seven different federal agencies, and numerous forums for issue discussions on compliance. FMI also utilized additional resources

to engage counsel to represent food retail industry interests before the DOJ and the FTC on patent trolls. FMI is currently recruiting for an additional regulatory counsel to assist Erik Lieberman in these efforts, so that the scope and range of issues addressed can be expanded.

Increased involvement in state and local government relations efforts

FMI's State Government Relations team created the State Government Relations Working Group, within the GR Committee, to identify and prioritize over 60 important state issues and trends. Additionally, FMI

added local issue tracking capability for the first time ever to assist members in identifying and managing emerging local issues.

Enhanced member awareness of FMI's GR activities

Aggressive use of a wide variety of communication tools, including government relations updates in each weekly and monthly publication: FMI Government Relations report and FMI Tax Time (weekly); *Aisle by Aisle*, FMI Labor Report, and FMI State Issues Update (monthly). Government Relations is leveraging interaction with the Independent Operators, Wholesalers, Consumer Affairs, Communications, Food Safety and Food

Protection Committees to expand member awareness of regulatory and legislative issues. The Government Relations team has also expanded its webpage to include timely issue updates and access to archived GR communications. Plans are underway to increase FMI GR's presence via social media to give members real-time legislative and regulatory alerts.

Resources added in 2013

2013 FMI GR WEBINARS

- (archived and available on FMI website)
- [USDA Presentation on Country of Origin Labeling Rule](#) (November 20)
 - [Overview of FSMA: Proposed Preventive Controls Rule for Animal Food](#) (November 1)
 - [Overview of FSMA Foreign Supplier and Third Party Auditor Rules](#) (July 31)
 - [OSHA's Hazard Communication Standard – What Retailers Need to Know](#) (July 30)
 - [USDA Presentation on Country of Origin Labeling Final Rule: Labeling Provisions for Muscle Cut Covered Commodities](#) (June 18)
 - [Employer Strategies for Implementing ACA](#) (June 6)
 - [The Affordable Care Act: Summary of Employer Requirements](#) (May 30)
 - [USDA's Final Rule on COOL Meat Labeling](#) (May 24)
 - [Patent Troll Litigation Alternatives](#) (February 27)
 - [FSMA: FDA's Produce Safety and Preventive Controls Rules](#) (January 10)

2013 REGULATORY COMMENTS FILED

Food and Drug Administration

- [FSMA Preventive Controls Proposed Rule](#) (November 22)
- [FSMA Produce Safety Proposed Rule](#) (November 22)
- [Guidance on Tobacco Sale Restrictions to Protect Children and Adolescents](#) (October 23)
- [FSMA Report on Product Tracing](#) (July 3)
- [Risk Assessment for Establishing Food Allergen Thresholds](#) (May 13)
- [Civil Money Penalties for Tobacco Retailers](#) (April 9)

Department of Agriculture

- [FNS Request for Information on SNAP Retailer Integrity](#) (November 6)
- [FNS: Implementation of the Electronic Benefit Transfer-Related Provisions for WIC Program](#) (May 29)
- [Letter to Secretary Vilsack Regarding Country of Origin Labeling](#) (April 30)
- [FNS: Proposed Rule on Suspension of SNAP Benefit Payments to Retailers](#) (April 23)
- [Mandatory Country of Origin Labeling](#) (April 11)
- [Country of Origin Labeling Information Collection Request](#) (February 4)

Internal Revenue Service

- [ACA Employer Information Reporting](#) (November 8)
- [ACA Minimum Value of Employer-Sponsored Health Plans](#) (July 2)
- [Shared Responsibility for Employers Regarding Health Coverage](#) (March 18)

Federal Trade Commission

- [Patent Assertion Entities](#) (December 16)
- [Patent Assertion Entities, 'Patent Trolls'](#) (April 5)
- [Fred Meyer Guides Review](#) (January 29)

Department of Labor

- [Employer Wellness Programs](#) Employee Benefits Security Administration (January 25)

Federal Reserve

- [Payment System Improvement - Public Consultation Paper](#) (December 13)



Food Safety

CONTACT: Hilary Thesmar, PhD, RD, CFS hthesmar@fmi.org

Executive Summary

- Developed food safety educational materials based on priority issues set by the retail food safety professionals. For 2013, the top-five priorities were *Listeria* control at retail, produce safety, FSMA implementation and compliance, traceability of foods and ground meat recordkeeping.
- Provided members with accurate, scientific and timely information on more than 30 food safety topics in 2013, and published 11 backgrounders on the FMI website.
- Positioned FMI as a Food Safety thought leader by presenting at 14 scientific and industry meetings and attending more than 20 scientific and regulatory meetings in 2013.



- Grew the SafeMark retail training program by over 10 percent and planned for a major rewrite in 2014 of publications and online training program to include the new 2013 FDA Food Code.

Technical and Scientific Support to Members

Work is underway to expand the reach of FMI's expertise in retail food safety by deepening relationships with local, state and federal regulatory officials and by cultivating programs to specifically address the needs of FMI's associate members. Plans are in place to begin a member communication tool for association members in

2014, specifically conveying food safety content. FMI's good working relationships with regulatory officials has strengthened its ability to provide informed, efficient and effective 24/7 crisis support to members when they are confronted with food safety, inspection, regulatory and compliance issues.

Food Safety Resources

The FMI Food Safety team provides scientific and technical support for member companies. In 2013, the Food Protection Committee focused its time and resources on five priority issues and made significant progress in those target areas. For example, the *Listeria* Action Plan for Delis was developed in 2012

and implemented throughout 2013. The FMI Board Food Safety Committee and the Food Protection Committee continue to hold joint meetings with a streamlined governance process that incorporates a high level of communication and coordination.

Positioning FMI as a Food Safety Thought Leader

Expanding the Food Safety Department to include four professional staff members (two with PhDs and one with a Master's degree in food science and technology) has magnified FMI's presence at scientific, industry and regulatory meetings. The food safety team gave 14 invited presentations in 2013 and attended more than 20 scientific and regulatory meetings. Many of these presentations led to media interviews and resulted in increased visibility for FMI's – and by extension the food retail industry's – commitment to and expertise in food safety.

SafeMark Retail Food Safety Training Program

With SafeMark as the premier food safety training program uniquely designed for retail associates, FMI is positioned to provide enhanced value to members, while benefiting from a non-dues revenue stream that delivers additional resources for member programs. The SafeMark marketing plan was implemented in 2013, utilizing the market research and brand platform that was completed in 2012. New target audiences, as well as potential areas for growth, have been identified. With the FDA Food Code update in 2013, all SafeMark materials will be revised in 2014 with new editions of print materials and new online training programs made available.

Resources added in 2013

PRINT MATERIALS

- **Guidance for Control of Listeria monocytogenes Risks in Retail Food Stores**
- Produce safety - guidance document scheduled for release in January, 2014
- FSMA Implementation and Compliance
 - <http://www.fmi.org/government-affairs/priority-issues/federal-affairs/food-safety>
- Traceability of Foods
 - FMI Foundation is a Founding Sponsor of the Global Food Traceability Center
<http://www.ift.org/gftc.aspx>
- **Sample Ground Meat Record for Retail Stores**
- **Comprehensive Guide Meat Ground at Retail Recordkeeping and Sanitation**

WEBINARS ON:

- **Bringing Food Safety to Local Growers**
- **Interagency Retail Lm Risk Assessment Briefing**
- **FDA 2013 Food Code**
- **FSMA: Overview of Produce Safety and Preventive Controls Rules**
- **Overview of FSMA Foreign Supplier and Third Party Auditor Rules** (July 31)

Executive Summary

- As of October 2013, Safe Quality Foods (SQF) had already surpassed expected net revenue goals, achieving approximately a 31 percent increase over 2012.
- To extend program reach and training opportunities, SQF has completed its Spanish training program, introduced a series of webinars on important topics, and conducted 11 SQF introductory “Information Days” across five countries.
- SQF has fully integrated Phase I of its new database system and has established an enhanced compliance and integrity system.

Exceeding Financial Expectations

According to the FMI Strategic Plan, SQF was projected to contribute \$0.9 million in operating



Safe Quality Food Institute's 2013 Quality Achievement Awards honoring auditors and companies who uphold the SQF mission.

income for 2013. As of the October 2013 financial statement, SQF had contributed \$1.13 million.

Expansion of Reach and Training Programs

SQF established a broad marketing program for 2013, conducting 11 one-day “Information Days” in the U.S., Mexico, Canada, Australia and Japan. The SQF team participated in numerous stakeholder events, including Institute of Food Technologists, International Association of Food Protection, International Association of Refrigerated Warehouses, the Food Safety Consortium and the Food Safety Summit. A new, 11-hour Spanish online SQF introductory training program was introduced to complement the English program. In addition, SQF has finalized a partnership with the feed and

pet food industries, bringing in more than 500 new registered facilities.

A series of one-hour webinars called “Learning Lunches” provided participants with insight on important SQF topics. The popularity of these free webinars has resulted in the expansion of webinar capability, as there has been an average of about 800 participants for each Learning Lunch. This program will be expanded in 2014, and sponsorship opportunities will be offered to interested stakeholders.

Continued Improvement of SQF Databases and Software

Phase I of the new database program has been completed and performance has stabilized. Resource and navigation problems necessitated postponing Phase II (reporting and enhanced administration tools) until 2014. SQF introduced an enhanced version of the code (7.1) in July 2013. The

revised code included several important components emerging from stakeholder input that contributes to “continuous improvement” of our program. Further enhancements to the code will be introduced in July 2014 (Version 7.2).



Communications

CONTACT: Sue Borra sborra@fmi.org or Heather Garlich hgarlich@fmi.org

Executive Summary

- Communicated the retail food industry position on the most critical priority areas, resulting in more than 4,400 FMI mentions.



- The media team trained key FMI staff subject matter experts to enhance communication skills and ensure FMI as a proactive voice on behalf of its members.
- Began updates to the FMI Crisis Communication manual to include social media, and started developing an online toolkit that will serve as a resource guide for FMI members. The guide will help streamline processes and shed new light on how companies can integrate social media into their crisis communications plans. Launch is early in the first quarter of 2014.

Communication of Priority Issues

Parallel with FMI's efforts to prioritize both current and emerging issues for the retail food industry, FMI worked with staff subject matter experts to prepare talking points, draft statements and ensure

FMI.org mirrored outgoing communications on a range of food retail industry issues. FMI was mentioned in traditional and online media more than 4,400 times between February and December 2013. FMI's position on regulatory issues, chiefly menu labeling, interchange fees and patent trolls, drove 30 percent of these mentions. Data from FMI

reports consistently generate media mentions, with *Tomorrow's Trends Delivered Today* and the Food Waste Reduction Alliance report on food waste receiving the most coverage.

FMI conducted a social media listening and monitoring phase, which will complement the social media strategy slated for launch early in the first quarter of 2014. FMI also developed a series of research vignettes that bring industry facts and messaging to life through short videos.

Media Training FMI Senior and Management Staff

FMI media trained eight subject matter senior and management FMI staff members from across departments including food safety, government affairs, consumer affairs, health and wellness and FMI Connect. The training included the interview

process, media preparation, crisis response, messaging and improving the overall storytelling in media interviews. FMI plans to provide media training to additional staff in 2014.

Development of Crisis Communications Manual

FMI, in collaboration with the Communications Committee, is updating the FMI Crisis Communication manual to:

- Provide guidance and put context around process involving crisis communications in a digital world
- Identify internal and external social media tools and outside resources to streamline information-collection and sharing
- Offer an interactive deliverable/online module that integrates a social media response plan into a crisis management plan, so these plans are truly one-in-the-same

The revised manual will be released in first quarter of 2014.

Resources Added in 2013

In 2013, FMI released media alerts, talking points, background information or additional resource material on the following topics and issues: These are available to members by contacting Jessica Carpenter at jcarpenter@fmi.org.

- Listeria Risk in Delis – public meeting
- Horse Meat
- Critical Books related to the Food Industry
- GE-seafood
- CSPI's Healthy Beverages Initiative
- Antibiotic Use in Food Animals
- Consumer Reports Ground Turkey bacteria testing at retail
- Farm Bill Markup and SNAP
- Food product dating: NRDC
- Food Waste: Benchmark report
- Single-load Dishwashing laundry packets safety alert
- GMOs
- FSMA proposed rules
- Cyclosporiasis outbreak warning/info
- Beta-agonists
- Scientific American Food Feature
- Arsenic in Rice
- Antibiotic resistance/CDC report
- Government Shut-Down
- Dehorning
- Purported turkey shortage
- 20/20 segment on grocery myths
- Food and Water Watch Report

WEBINARS ON:

- [The Business Side of Social Media: Untangling the Web](#)

FMI was mentioned in traditional and online media more than 4,400 times between February and December 2013.

FMI issued 74 press releases in 2013.



Consumer and Community Affairs

CONTACT: David Fikes dfikes@fmi.org

Executive Summary

- Participated actively in the design of FMI research resources regarding consumer trends and shopping behaviors.
- Re-instituted FMI's Community Outreach Awards Program to highlight industry efforts in the area of corporate social responsibility.
- Enhanced FMI as a resource in animal welfare issues by publishing FMI's Animal Advisory Committee's evaluation of the animal welfare guidelines established by various meat and poultry commodity associations.

Forward Looking Research

FMI's Consumer Affairs department actively participated in each phase of the 2013 FMI collaboration with Booz & Co, CROSMARK, Nielsen and Catalina to produce a forward-looking analysis of the trends expected to drive food retail over the next decade. FMI's premiere presentation of this research - focusing on consumer trends; overall demand/capacity; consumer shopping decision drivers; display strategies; tomorrow's merchandising and marketing trends and technology - took place at the 2013 FMI Future Connect meeting in Dallas, Texas. Consumer Affairs also played a role in facilitating the contracted collaboration with the Hartman Group for the 2014 Trends research.

Community Outreach Awards

From a field of 15 nominees, FMI recognized six food retailer companies for their 2012 work in the areas of youth development programs, initiatives addressing food insecurity or neighborhood health programs. Winners received recognition in industry



Photo from 2013 Community Outreach Award winning program in youth development category.

Resources added in 2013

- See the list of media alerts, talking points, background information or additional resource material under the Communication's report
- *FMI's Evaluation of Animal Welfare Guidelines*, available at www.fmi.org.
- A compete revision of *The Food Keeper 2013*, available online at www.fmi.org and in print form from the [FMI Store](#).
- Established database of Community Outreach Award initiatives and programs, which can be accessed at <http://www.fmi.org/about-us/awards-and-community-outreach>.

WEBINARS ON

- [Tax Incentives for Retailer Food Donations](#)

publications, a \$1,000 contribution to their award winning program and were included in the food retail community service project database. The nominations for the 2013 award program will be accepted until December 31, 2013.

Evaluation of Animal Welfare Guidelines by FMI Animal Advisory Committee

FMI's Animal Advisory committee – comprised of scientists and veterinarians - completed an evaluation of guidelines provided by nine farm animal commodity groups. The evaluation grid analyzed the guidelines across 21 categories, providing

food retailers with helpful information regarding the safe and humane treatment and transport of food animals. FMI was also utilized as a resource and speaker on consumer trends in animal welfare issues in eight different venues in 2013.

Emerging Issues

CONTACT: Sue Wilkinson swilkinson@fmi.org

Executive Summary

- The FMI Staff Emerging Issues team, comprised of senior and management staff members, has identified 10 categories of key emerging issues facing the food retail industry and designed a scoring system to prioritize the issues.
- In 2014, FMI will implement a systematic approach for continual identification and prioritization of emerging industry issues.



- The 2014 Member Needs Survey will be used to obtain quantitative data on issue priorities of members.

Initial Issue Identification and Prioritization

In July 2013, FMI assembled a team of senior staff to complete the following tasks:

- Identify and discuss emerging issues for the food retail industry
- Develop generalized criteria to rank priority and opportunity of issues

- Rank key issues based on defined criteria
- Discuss FMI's role in supporting issues

These exercises culminated in a detailed list of 10 categories of key emerging issues, which aligned closely with the Board's priority issues identified at the 2013 Midwinter Board meeting.

Development of Systematic Approach for Scanning the Landscape

In 2014, FMI will implement a systematic approach enabling a continual scan and evaluation of emerging issues in the industry. Furthermore, FMI will

develop strategic means for providing members with an up-to-date summary of all issues.

Member Needs Survey

To better evaluate FMI's role in addressing emerging threats and opportunities, FMI will utilize the 2014

Member Needs Survey to receive quantitative member feedback on the priority ranking of these issues.



Research

CONTACT: Sue Borra sborra@fmi.org or Sue Wilkinson swilkinson@fmi.org

Uploads from Food Marketing Institute by Food Marketing Institute

Executive Summary

- Collaborated with service provider partners to extend the 2012 research that identified key trends in food retailing. The 2013 research study examined additional forces that will shape the retail food industry in the next 10 years, with the goal of addressing the challenges FMI members face today and in the near future.
- Produced five benchmark reports that provide insight into retail operations and consumer shopping behavior.

THE WAY AMERICANS ARE FOOD SHOPPING IS CHANGING



- Provided guidance for research conducted by other FMI units.

Forward Looking Research

FMI collaborated in 2013 with Booz & Co, CROSMARK, Nielsen and Catalina to provide a forward-looking analysis of the trends that are expected to drive food retail over the next decade. The report focuses on consumer trends, overall demand/capacity, drivers of the consumer

shopping decision, display strategies, tomorrow's merchandising and marketing trends, and technology. This research was presented at the 2013 FMI Future Connect meeting in Dallas, TX, and a series of webinars offered over the summer provided more in-depth analysis of the research material.

Resources Added in 2013

- *The Food Retailing Industry Speaks 2013 Data Tables*, available in the [FMI Store](#).
- *U.S. Grocery Shopper Trends Data Tables*, available in the [FMI Store](#).
- *Shopping For Health, 2013*, available in the [FMI Store](#).
- *Power of Meat*, available in the [FMI Store](#).
- *Food Retailing 2013: Tomorrow's trends Delivered Today*, available in the [FMI Store](#).

- *Digital Grocery Commerce: Exploring the potential for Grocery Shopping Apps*, available in the [FMI Store](#).

WEBINARS ON:

- [Food Retailing 2013: Tomorrow's Trends Delivered Today: Overview #1](#)
- [Food Retailing 2013: Tomorrow's Trends Delivered Today: In-Store Merchandising Innovation: Table Stakes or Differentiators?](#)

- [Food Retailing 2013: Tomorrow's Trends Delivered Today: Perspective on Market Dynamics](#)
- [Food Retailing 2013: Tomorrow's Trends Delivered Today: Perspective on Technology In-Store](#)
- [The Power of Meat: An In-depth Look at Meat through the Shoppers' Eyes](#)
- [Marketing Innovation: Behavior is the New Demographic](#)
- [Digital Grocery Commerce: Exploring the Potential for Grocery Shopping Apps](#)

Consumer and Industry Benchmark Data

FMI produced benchmark consumer and operations research in numerous categories, with the following reports released in 2013:

- *The Food Retailing Industry Speaks 2013 Data Tables*
- *U.S. Grocery Shopper Trends Data Tables*
- *Digital Grocery Commerce: Exploring the Potential for Grocery Shopping Apps*
- *Shopping For Health*
- *Power of Meat*
- *Food Retailing 2013: Tomorrow's Trends Delivered Today*

Supporting Research Needs of Other FMI Units

The Research Department provided guidance for the development of *Food Retailing and Wholesaling Audit Study* for the Internal Audit Conference and

the *Food Retailing Financial and Business Review* for the Financial Executive Conference.



Sustainability

CONTACT: Jeanne von Zastrow jonzastrow@fmi.org

Executive Summary:

- Worked to provide enhanced sustainability resources to all categories of food retailers.
- Collaborated with stakeholders to advance sustainable seafood sourcing policies.
- Addressed key food waste issues by leading and participating in the Food Waste Reduction Alliance.
- Increased visibility of industry sustainability efforts with NGO and government agencies through the FMI/GMA Global Sustainability Summit.



FMI President and CEO Leslie Sarasin, seated third from the right, participates with Agriculture Secretary Tom Vilsack, seated fifth from the right, in the launch of the USDA's U.S. Food Waste Challenge.

Expansion of FMI's Sustainability Resources for all Members

FMI produced the "Business Case for Sustainability Guide," a primer with case studies on how to communicate about the business sense undergirding sustainability efforts. In addition to developing the program and coordinating the resources for the

FMI/GMA Global Sustainability Summit, FMI also created several webinars for the industry covering key emerging issues, such as sustainable sourcing, sustainable supply chain, recycling and food waste.

Collaboration with Stakeholders to Advance Sustainable Seafood Sourcing Policies

FMI created four sustainable seafood webinars for the industry on issues such as sustainable seafood best practices, fisheries improvement partnerships and International Seafood Sustainability Foundation. A new FMI publication, entitled “The What, Why

and How of Sustainable Fisheries Improvement Partnerships and What’s in it For You? Best Practices and Guidelines for Retailers” was also initiated this year.

FMI’s Leadership Role in Addressing Key Food Waste Issues

The Food Waste Reduction Alliance (a collaboration of FMI, GMA and NRA) made strides this year in advancing its cause of reducing waste at sources, sending more safe food to the hungry and moving waste from landfill to productive use. The Food Waste Reduction Alliance (FWRA) released its initial report benchmarking the retail and manufacturer industry on quantity, destination and opportunities/barriers for reducing food waste. Preparations are underway for the second edition, which will include restaurant industry information. Additionally, the

group created “Best Practices for Reducing Food Waste Toolkit,” which will be released the first quarter of 2014. Interest in the food waste issue has been keen this year, and members of FWRA have been asked to present initiative information at 14 industry events across North America and Canada. As a founding member of USDA/EPA’s U.S. Food Waste Challenge, FMI participated with Agriculture Secretary Vilsack at the launch event on June 5, 2013.

Increased Visibility of Global Sustainability Summit

This year, nearly 500 industry sustainability executives from retailers, suppliers, restaurants, government, NGOs and academia gathered to discuss, advance, and improve sustainable practices in the food industry. Fifty percent of the attendees at the Global Sustainability Summit were first timers, and 30 percent were millennials. FMI has been approached by sister associations in Canada and Latin America to participate as collaborating partners in the 2014 Summit.

Resources Added in 2013

PRINT MATERIAL

- The What, Why and How of Sustainable Fisheries Improvement Partnerships and What’s in it For You?”

WEBINARS ON

- **What Retailers and Wholesalers Need to Know About the FTC Green Guides**

FMI Connect: The Global Food Retail Experience

CONTACT: Susan Krys skrys@fmi.org or Toni Mascaro tmascaro@fmi.org

Executive Summary

- Rebranding and expanding the scope of the FMI Show to create an event that is the annual destination for the food retail industry – a place where connections happen, innovations are celebrated and solutions are formulated.
- Creating specialty programs which will offer insights into the future of food retail, showcase corporate chefs' talents and award innovations and leadership.
- Growing the breadth of exhibitors and quality of exhibits through partnerships, topical pavilions and growth of key exhibitor segments.



- Expanding educational offerings to explore innovative approaches to delivering information and tie together classroom learnings with experiences and offerings in the exhibit hall.

Rebranding and Expansion of the Scope of the FMI Show

The FMI Show was rebranded in 2013 as *FMI Connect: The Global Food Retail Experience*. The new FMI event is redesigned to connect the industry and inspire the future of food retail. FMI Connect's mission is to provide solutions to the greatest food retail challenges: growing basket

size, increasing customer trips, improving margins, increasing market share and developing leadership. The campaign theme, "If It's Out There, It's In Here" conveys the planning philosophy that everything relevant to food retail will be found at the event.

Creation of Specialty Programs

A number of specialty programs will enhance the attendee and exhibitor experience by making the event more useful and insightful. The flagship will be the "Retail Experience of the Future," offering an interactive, multi-media, experiential look at what industry futurists envision as the future of food retail.

Other programs include an all-day Supermarket Chef Showdown competition, corporate culinary demonstrations and two awards programs – one for store managers, and the other for new product innovations.

Breadth of Exhibitors and Quality of Exhibits

FMI's four partner organizations (United Fresh Produce, InterBev, PMMI-PACK EXPO and NASDA) expand the breadth of exhibits to include produce, beverages, packaging solutions and state departments of agriculture. FMI staff category captains have identified several industry growth

segments: fresh/perishables; health and wellness; retail technology; private brand; and international and sustainability; and are working to develop pavilions and special-interest areas dedicated to these segments.

Expansion of Educational Offerings

The education at FMI Connect 2014 will focus on innovative approaches to delivering information through active learning environments that are more interactive and engaging. Education will take place not only in traditional session rooms, but also in a new learning lounge located in the exhibit hall. FMI Connect will become an ongoing educational

experience with components offered both prior to and after the annual gathering. Educational programming will be tied to the exhibits through online and mobile app tools, which will increase the value of these exhibits for both member and non-member attendees and the participating exhibitors.

Membership

Executive Summary

- Grew the depth and breadth of FMI membership by prioritizing prospective new members, evaluating the dues/benefits packages and designing a recruitment package that includes information regarding relationships in all categories of membership.
- Enhanced retention strategy by developing increased touch points and establishing relationships at more levels of member organizations to deepen member engagement.

Breadth of FMI Membership

FMI's Membership Department is developing a recruitment priority list for members and senior staff action as part of an overall 2014 membership recruitment strategy. The membership team continues to evaluate the value and benefits of FMI's membership offerings and is exploring

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- Expanded reach of member newsletter *Aisle by Aisle* to increase member awareness of FMI resources and to demonstrate the business value of FMI membership.

the potential of adding "non-supermarket" food retailers to FMI's membership portfolio. In 2013, the membership department was very successful in growing membership, including a significant push in associate member recruitment and adding a focus on fresh foods.

Depth and Engagement of FMI Membership

FMI has identified the key executives for the top 20 dues payers and will be completing a client relationship management system for members in the first quarter of 2014. FMI's commitment to expand share group opportunities to non-competing members is a key component of the overall retention strategy.

Member Awareness and the Business Value of FMI Membership

To provide members with FMI updates and an opportunity to exchange ideas, the department held two regional membership meetings in Chicago and Baltimore. In addition, the Membership Department collaborated with the communications team to develop a membership webinar, which will be held in the first quarter of 2014 and will focus on raising awareness of FMI's benefits and resources. The

Resources added in 2013

- *Impacting Sales: A Holistic Approach to Supplier Diversity in the Food Retail Industry*, available in the [FMI Store](#).
- Began publishing an international version of *Aisle by Aisle*, FMI's monthly e-newsletter.



Executive Summary

- Conducted 14 conferences serving more than 6,900 participants, receiving quality ratings of good to very good.
- Developed innovative FMI Connect 2014 education program that supports and enhances the tradeshow and reflects the total store.
- Created focused programming for independent operators (IOs).
- Offered more than 100 online training courses, and performed strategic analysis of current offerings to identify potential opportunities.

two departments have collaborated on an end of year video to convey the accomplishments of the association. Furthermore, the Membership and Communications teams increased the distribution of *Aisle by Aisle* to all individuals at all member companies, increasing the mailing list from 1,200 to more than 16,000.

CONTACT: Carol Abel cabel@fmi.org



Winners of the 2013 Store Manager Awards

- Held highly successful Future Connect Leadership Conference 2013 and explored opportunities to create other leadership programs.

Education Conferences

In 2013, FMI delivered 14 conferences and signature events. These events served more than 6,900 participants and earned an average overall quality rating of 4.25 (5 point scale) and an average education quality rating of 4.10.

FMI Connect: The Global Food Retail Experience 2014

The FMI Education department has been working closely with the tradeshow team to develop education tracks that support the total store emphasis, including integrating health and wellness and private brands conferences with FMI Connect and co-locating the Retail Food Safety Conference. Developed plans for show-floor based learning center to bring innovative education to the exhibit floor.

Independent Operator Programs

Presented independent operator-specific sessions at Midwinter 2013 and developed similar programming for Midwinter 2014. An “Insights for Independents” track of approximately five breakout sessions is in

Online Training Programs

FMI offered more than 100 online training courses covering an array of industry-specific topics and also conducted an analysis of current offerings and

Leadership Development

More than 1,400 current and emerging industry leaders participated in the 2013 Future Connect Leadership Conference. FMI also began exploring partnerships with other organizations to broaden

Resources added in 2013

WEBINARS ON

- [Buying into the Local Food Movement](#)
- [Leading at the Speed of Trust](#) (3/7/13)
- [Using Technology to Engage your Employees](#) (3/14/13)
- [Execute a Winning Strategy with Competency-based Leadership Development](#) (3/21/13)
- [Diversity and Inclusion: Should it be Managed or Led?](#) (4/3/13)
- [Global Eating Culture in a Multicultural Marketplace](#) (4/10/13)

development for FMI Connect 2014. An IO focus is also being developed in other FMI education conferences

potential opportunities. Going forward, this review will help shape FMI’s online education strategy.

leadership development opportunities and is in discussions with the Western Association of Food Chains to expand the Retail Management Certificate program to a national audience through FMI.



Health & Wellness

CONTACT: Cathy Polley cpolley@fmi.org

Executive Summary

- Provided FMI members with the resources to create, expand and maintain their health and wellness offerings by conducting the Health and Wellness Conference.
- Collaborated with GMA on implementation of the “Facts Up Front” program and partnered with *Prevention Magazine* to publish the 21st *Shopping for Health* consumer research study.
- Delivered a Pharmacy Benefit Manager (PBM) Benchmarking Summit and a Contracting Manual, and worked with the broader national pharmacy stakeholders’ coalition to advance community pharmacy’s agenda.

Health & Wellness Priorities

FMI hosted the 2013 Health & Wellness @ Retail conference which successfully connected retailers and their supplier partners so that together they could provide in-store solutions for today’s health-minded shoppers. In 2014, FMI’s health and wellness education will reach a much broader audience by being integrated into FMI Connect. Working through the FMI Foundation, the family meals program “Let’s Put Our Plates Together” was

launched and the inaugural Gold Plate Awards were presented to six deserving retailers.

The website for The Center for Retail Health & Wellness will be enhanced in 2014 with additional information, ease of access, relevancy and timeliness for our members. In Q1 2014, the new toolkit *A Healthy Approach to Business: Hiring and Leveraging Retail Dietitians* will be launched.

Partnerships Having a National Impact

The consumer-facing website for Facts Up Front, the FMI/GMA voluntary front-of-pack labeling program, was launched. The national media campaign is set for Q1 2014, with a retailer toolkit currently under development.

The 21st annual *Shopping for Health Report* was published in partnership with *Prevention Magazine*.

Nutrition Facts

Nearly 75% of shoppers read food labels

A majority of those shoppers look for:

- Salt/sodium content
- Sugar/artificial sweeteners
- Fat
- Trans Fat
- Calories
- High-fructose corn syrup

Shopping for Health 2013

This report provides members with a glimpse of what influences today’s consumers who are looking to make healthier decisions when shopping in the grocery store. Results of the second annual *Retailer Contributions to Health and Wellness* survey were also published, providing a perspective on what FMI retail members are offering those shoppers seeking healthier lifestyles.

Unique Pharmacy Support

FMI hosted a Pharmacy Benefit Manager (PBM) Summit and produced a PBM Contracting Manual, which provided FMI members with guidance on PBM practices related to pricing, generic drugs, payments, audits and other key topics. It also addressed the HIPAA Privacy Guidance, community pharmacy accreditation and pharmacy provider status under Medicare Part B.

Resources Added in 2013

- **Shopping For Health 2013**, and available in the [FMI Store](#)
- [How to Implement Your Wellness Program](#)
- [Health and Wellness Survey](#)
- [Newly Issued Guidance on Retail Pharmacy Refill Reminders](#)
- [Pharmacy Rewards Program](#)



CONTACT: **Cathy Polley, Executive Director, FMI Foundation** cpolley@fmi.org

Executive Summary

- Progress was made to ensure continued and adequate funding for The FMI Foundation. In 2013, more than \$800,000 was raised at the annual fundraising gala and a capital campaign is under consideration.
- An Annual Report was published and the Foundation website was redesigned to more effectively highlight the benefits of contributing to the Foundation's mission.
- The Food Safety Summit and the Health & Wellness @ Retail Conference will be integrated into FMI Connect beginning in 2014.

Ensuring Adequate Funding

On January 13, 2014, the 3rd Annual FMI Foundation Industry Leadership Dinner will be hosted in conjunction with FMI's Midwinter Executive Conference. Funds raised at the annual gala help deliver vital research, collaboration and education to address food safety, health and nutrition concerns. For the past three years, this has been the sole



FMI Foundation Executive Director Cathy Polley; Meredith Mensinger of Redner's Warehouse Markets, a Gold Plate award winner; and Chavanne Hanson of Nestlé USA, Gold Plate Award program partner and founding supporter.

fundraising event for the foundation. In 2014, the inaugural FMI Foundation Fun Run will be held in conjunction with FMI Connect. In addition, the Foundation will investigate the launch of a broad capital campaign to ensure continued and adequate funding.

Enhancing Communications to Current and Potential Donors

This year's annual report and redesigned website were both streamlined to enable readers to swiftly gain an understanding of the key accomplishments of the FMI Foundation in 2013. Meaningful grants in each of the three priority areas – food safety, health and nutrition – were highlighted to showcase the value Foundation programs have for the retail food industry. Examples include: funding critical *Listeria*

Broadening the Reach

Issues of food safety, health and nutrition remain of paramount importance to the food retail industry. To expand education reach to a broader audience, the

Resources Added in 2013

- [FMI Foundation 2013 Annual Report](#)
- [Let's Put Our Plates Together Website tools](#)

research, initiating a scholarship program targeting potential future food safety auditors, launching the *Let's Put Our Plates Together* family meals program and providing tools to help members deliver against their health and nutrition strategies.

FMI Foundation will integrate the Health & Wellness @ Retail Conference and the Food Safety Summit into FMI Connect in June 2014.

Total Store Collaboration

CONTACT: **Mark W. Baum** mbaum@fmi.org

Executive Summary

- FMI has defined an overall structure and plan for the Total Store Collaboration (TSC) initiative, and is preparing for an official Q1 2014 kickoff.
- Significant progress has been made in building support for TSC, particularly among the FMI associate membership. This will be enhanced over the coming months.
- In an effort to drive immediate, tangible progress through TSC, an initial set of key priorities has been identified with input from FMI members. Work on two priorities, Rapid Recall Exchange and Next-gen Product Identification, is currently underway.

Infrastructure

The overall objectives, agenda, governance and initiatives of Total Store Collaboration have received wide support from internal stakeholders and from select retailers, manufacturers, suppliers, and service



- Two new forums, targeted at senior merchandising and retail/store operations executives, are being launched at FMI Connect to provide resources to an underutilized group of stakeholders.

providers. FMI has focused efforts on ensuring that the parity-based CEO Forum leadership group will be representative of the entire food industry. An official launch is scheduled for Q1 of 2014.

CEO Interest and Engagement

FMI has been successful in recruiting Private Label and Fresh manufacturers/suppliers who are interested in participating in the TSC initiative. This support is accompanied by a core group of retailers

and Food & Beverage manufacturers who have also endorsed TSC, as it addresses a broader set of their supply- and demand-side concerns.

Key Industry Priorities

The TSC CEO Forum will focus on one or two key industry-wide priorities each year, ensuring that tangible progress is made on each item. Through partnership with the Trading Partner Alliance (TPA),

FMI has defined a team and is working on two key priorities: Rapid Recall Exchange and Next-Gen Product Identification.

Merchandising and Operations Forums

To further support TSC, FMI is creating Senior Merchandising Executive and Senior Operations Executive Forums, which will serve as peer-to-peer networks to discuss key industry issues. The

Forums' frameworks, event portfolios and core groups of participants have been defined, and the official kick-off event will take place at FMI Connect.



Fresh Foods

CONTACT: Mark W. Baum mbaum@fmi.org or Jeanne Von Zastrow jvonzastrow@fmi.org

Executive Summary

- Established the Fresh department within the Total Store Collaboration initiative by developing a department mission statement and identifying topic areas for focus in 2014.
- Increased communication with the most senior Fresh executives in order to understand member priorities and improve engagement in Fresh.
- Created new Fresh programming for FMI Connect 2014 to tackle significant issues facing Fresh executives today.



Fresh Mission Statement and Focus Areas

With the establishment of a Fresh department within FMI, the leadership has defined the following mission statement: FMI will become the “Voice for Fresh” in driving industry collaboration and communications, making FMI a key resource in helping members innovate, improve operations performance and maximize consumer experience in all Fresh areas of the retail food industry.

Working with members, FMI has identified key emerging issues and trends for advocacy, education

and research activities in Fresh, including standards, product traceability, Rapid Recall Exchange, data synchronization, and in-store food service, as well as areas of overlap with efforts in Health and Wellness, Food Safety, and Sustainability in Seafood and Agriculture.

Looking ahead, in 2014 FMI plans to dedicate new staffing and resources to build out the Fresh capabilities within the Total Store Collaboration initiative.

Improved Engagement through Increased Member Communication

FMI has increased the cadence of communication with the most senior Fresh executives in order to improve engagement of members and further educate them on FMI’s Fresh resources. In-house

and external experts were brought in to host seven webinars and conference calls with senior Fresh executives on top-of-mind topic areas.

New Fresh Programming at FMI Connect 2014

Through its Fresh Executive Committee, FMI has provided suppliers, ideas and educational recommendations for increased Fresh presence at FMI Connect. Fresh professionals will be invited to a meeting at FMI Connect, with planned content discussions including: new innovations in

traceability, fresh and whole health solutions, issues and answers for sustainable agriculture, emerging innovations and sales trends for fresh, leveraging the natural and organic shopper and maximizing success in the fresh supply chain.



Asset Protection

CONTACT: Rhett Asher rasher@fmi.org

Executive Summary

- Conducted a member cyber security survey to identify priorities and member needs, resulting in the identification of five key priorities.
- Enhanced membership value in Asset Protection through the development of research, surveys, and issue specific benchmarking such as: video usage trends; operational shrink strategies; AED

programs; store risk assessments; and fraud mitigation.

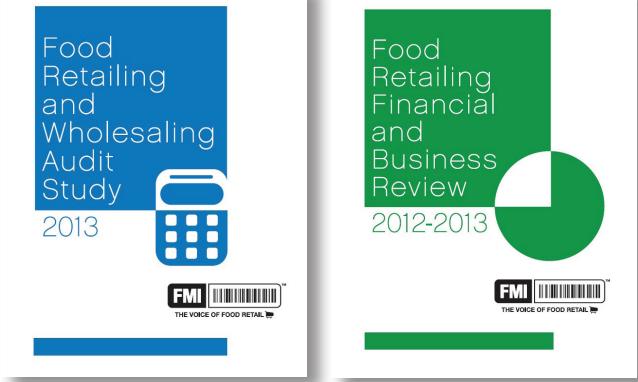
- FMI’s annual Asset Protection Conference continues to expand and broaden educational offerings and challenges the way leaders in Asset Protection, Risk Management and Safety regard their roles and value within their organizations.

Cyber Security Resources for Members

FMI collaborated with Theresa Payton, former White House CIO, to develop and analyze a Cyber Security member needs survey. The findings of the survey established five key priorities: a new or enhanced

cyber liability policy; better security for social networking; crisis communication or PR resources; better supply chain management with vendors; and improved threat briefings and ongoing awareness.

Enhanced Asset Protection Resources



FMI published the 2013 *Asset Protection Department Structure and Compensation Study*, which provides benchmark information on food retail companies' asset protection department structure. Store Risk Assessment Guidelines are in development, along with other leadership

Resources Added in 2013

- *Food Retailing and Wholesaling Audit Study 2013*, available in the [FMI Store](#).
- *Food Retailing Financial and Business Review 2012-2013*, available in the [FMI Store](#).

resources for FMI's member professionals in Asset Protection, Risk Management and Safety, such as: industry certification and certificate programs; public and private partnership opportunities; and peer education and networking events.

Annual Asset Protection Conference

The annual FMI Asset Protection Conference has now become a must-attend event in the retail food industry for all executives in Asset Protection, Loss Prevention, Risk Management, Crisis Management, Operations, Cyber Security and Safety. Through

expanded education and a theme of protection of people, property and reputation, this event continues to challenge executives to "think differently" and find additional ways to add value to their positions by driving operational excellence and sales.



Private Brands

CONTACT: Mark Baum mbaum@fmi.org or Doug Baker dbaker@fmi.org

Executive Summary

- Increased representation of Private Brands within the membership to better reflect increasing size and impact in the industry.
- Created new programming to establish a significant Private Brands track at FMI Connect 2014.
- Co-located our Business Conference with the PLMA Show to leverage the gathering of Private Brand executives, increasing FMI retail member participation by 16 percent.



- Surveyed the FMI membership to measure how Private Brands members value FMI's offerings, with findings being used to guide the restructuring of FMI's Private Brands committees.

Increased Private Brands Representation

To promote the voice of Private Brands within the Total Store Collaboration (TSC) initiative, FMI has made efforts to increase the representation of Private Brands both within the FMI membership and within the TSC CEO Forum, in order to better reflect their increasing size and importance in the industry. Under the umbrella of Total Store Collaboration, Private Brands will be integrated in or lead appropriate initiatives, and will further engage both retail and manufacturer members in the process.

Furthermore, FMI has made efforts to move Private Brands into a critical role in key Trading Partner Alliance initiatives, including the "Facts Up Front" labeling program, Rapid Recall Exchange, and other emerging issues like Product Dating and GMO labeling.

New Private Brands Track at FMI Connect June 2014

To establish an all-Private Brands track at FMI Connect 2014, FMI created new programming on key issues and trends affecting executives and practitioners. Topics to be discussed will include

"best in class" Private Brand programs, changing dynamics between Private and National Brands, and the category management process for Private Brands.

Private Brands Business Conference 2013

The Private Brands Business Conference 2013 was co-located with the PLMA Conference to leverage the gathering of PB executives and their

retail partners. As a result, participation by FMI retail members at the conference increased by 16 percent.

Restructuring to Align Private Brand Committees with Member Values

The Private Brands Membership and Governance committee developed and executed a survey of FMI members in the third quarter of 2013 to measure the importance of FMI's offerings to Private Brands members, including industry-specific events, cross-industry resources and thought leadership, peer and

industry networking, and committee participation. These findings were presented to our FMI Private Brands Committee members and will be utilized to guide the restructuring of FMI's Private Brand committees.

Business Development

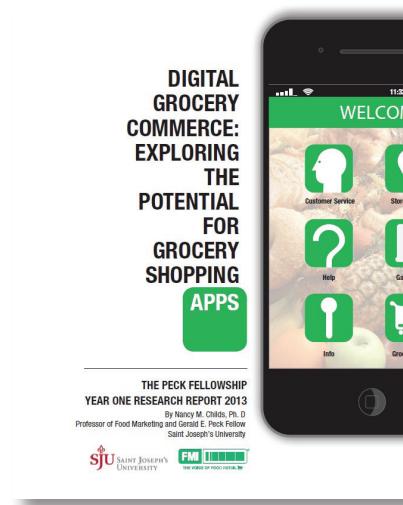
CONTACT: **Mark Baum** mbaum@fmi.org

Executive Summary

- Expanded the breadth and depth of associate membership through joint business planning meetings and additional efforts to enhance program value.
- Reinstated FMI Connect as the industry's focal event with associate members.
- Broadened reach of associate member involvement in retailer and supplier Total Store Collaboration.

Expanding Associate Membership

FMI conducted more than 50 joint business planning meetings with associate members, establishing specific goals for long-term engagement. In addition, FMI secured 83 new associate member companies in 2013 and is projected to exceed associate



member dues income budget by \$276,000. Efforts are underway to evaluate and enhance associate member program benefits and value through a comprehensive evaluation of the associate member dues and member benefits structure.

Reinstituting FMI Connect as the Industry's Focal Event

FMI secured \$900,000 of sponsorship commitments for the Retail Experience of the Future at FMI Connect 2014 in Chicago. In addition, co-location commitments have been arranged with Packaging Machinery Manufacturers Institute (PMMI) to create an 80' X 80' exhibit showcase featuring latest trends and innovations in product packaging and with InterBever, the beverage industry's premier

trade show. FMI Connect has a fully integrated sponsorship sales plan and prospectus for associate members.

Broadening Reach of Associate Member Involvement

FMI developed a new operating and governance structure for the FMI Industry Collaboration Council as part of the FMI Total Store Collaboration Forum, which will be implemented in the first quarter of 2014. The 2014 Midwinter Conference will feature two prominent ICC events: the first-ever “Celebrating Our Industry” reception/dinner and awards program, and the sold-out Midwinter Strategic Executive Exchange program. In March of 2014, the ICC will host the Annual Business Conference, which has exceeded company participation targets. Outside of industry events, FMI plans further support of collaboration through the launch of “One to Many” and the “MarketLink” on-line collaboration tool in early 2014.

Resources Added in 2013

- *Digital Grocery Commerce: Exploring the potential for Grocery Shopping Apps*, available in the [FMI Store](#).
- *Food Retailing and Wholesaling Audit Study 2013*, available in the [FMI Store](#).
- *Food Retailing Financial and Business Review 2012-2013*, available in the [FMI Store](#).

Food Marketing Institute Staff

Leslie Sarasin President & CEO lsarasin@fmi.org (202) 220-0890	FINANCE	Pat Davis Vice President, State Government Relations pdavis@fmi.org (202) 220-0637	Rhett Asher Vice President, Asset Protection, Data Security and Crisis Management rasher@fmi.org (202) 220-2774	Ben Quigley Senior Manager, Convention & Meeting Services bquigley@fmi.org (202) 220-0716
Cidney McNeil Executive Assistant cmcneil@fmi.org (202) 220-0620	Sam Dicarlo Senior Vice President, Finance & CFO sdicarlo@fmi.org (202) 220-0750	Erik Lieberman Regulatory Counsel elieberman@fmi.org (202) 220-0614	Doug Baker Vice President, Private Brands dbaker@fmi.org (202) 220-0719	Gladys Swearingen Senior Manager, Member Services gs swearingen@fmi.org (202) 220-0641
George Green General Counsel ggreen@fmi.org 202-220-0613	Judy Duffy Senior Director, Finance jduffy@fmi.org (202) 220-0762	Andrew Harig Director, Government Relations aharig@fmi.org (202) 220-0628	Pat Walsh Vice President, Supply Chain & Chief Business Development Officer pwalsh@fmi.org (202) 220-0703	Colleen Bailey Manager, Meeting Services cbailey@fmi.org (202) 220-0704
COMMUNICATIONS & MARKETING	Gregory Nelson Senior Director, Finance gnelson@fmi.org (202) 220-0757	Stephanie Simpson Director, Human Resources ssimpson@fmi.org (202) 220-0767	Peter Collins Director, Business Development pcollins@fmi.org (202) 220-0737	Meredith Bombella Manager, Education mbombella@fmi.org (202) 220-0728
Sue Borra Senior Vice President, Communications and Strategic Planning sborra@fmi.org (202) 220-0654	Michael Coles Staff Accountant mcoles@fmi.org (202) 220-0754	Robert Rosado Director, Government Relations rrosado@fmi.org (202) 220-0642	Heather Cain Manager, Meeting Services hcain@fmi.org (202) 220-0815	
David Fikes Vice President, Consumer/ Community Affairs & Communications dfikes@fmi.org (202) 220-0720	Monique Gardner Customer Service Representative/Receptionist mgardner@fmi.org (202) 220-0600	Julie Schrei Director, Political Affairs jschrei@fmi.org (202) 220-0636	Debbie Stewart Manager, Registrant Services dstewart@fmi.org (202) 220-0828	
Jeanne von Zastrow Senior Director, Sustainability jvonzastrow@fmi.org Home (435) 259-3342	Eugene Hagood Administrator, Finance ehagood@fmi.org (202) 220-0756	Elizabeth Tansing Director, State Government Relations etansing@fmi.org (202) 220-0708	Caroline Cummings Administrator, Meeting Services ccummings@fmi.org (202) 220-0808	
Sue Wilkinson Senior Director, Information Service and Research swilkinson@fmi.org (202) 220-0666	Cathy Sidbury Administrator, Accounts Payable csidbury@fmi.org (202) 220-0850	Hannah Walker Director, Government Relations hwalker@fmi.org (202) 220-0630	Amma Owusu Administrator, Registrant Services aowusu@fmi.org (202) 220-0662	
Heather Garlich Director, Media & Public Relations hgarlich@fmi.org (202) 220-0616	Travis Stevenson Administrator, Operations tstevenson@fmi.org (202) 220-0845	Steven Harris Senior Manager, Policy Development & Regulatory Compliance sharris@fmi.org (202) 220-0632	Jordan Pietrak Administrator, Education jpietrak@fmi.org (202) 220-0668	
Ryan Orton Director, Marketing rorton@fmi.org (202) 220-0814	Van Thomas Administrator, Accounts Receivable vthomas@fmi.org (202) 220-0755	Michael Green Administrator, State Government Relations mgreen@fmi.org (202) 220-0605	Megan Tinklepaugh Administrator, Member Services mtinklepaugh@fmi.org (202) 220-0692	
Andrea Miller Senior Manager, Database Services amiller@fmi.org (202) 220-0785	FOOD SAFETY PROGRAMS	Hilary Thesmar Vice President, Food Safety Programs htesmar@fmi.org (202) 220-0658	Susan Krys Vice President, Industry Events skrys@fmi.org (202) 220-0816	SAFE QUALITY FOOD INSTITUTE (SQFI)
Vickie Brown Manager, Research vbrown@fmi.org (202) 220-0729	Josh Katz Director, Food Safety Programs jkatz@fmi.org (202) 220-0659	Laura Piccioli Administrator, Government Relations lpiccioli@fmi.org (202) 220-0864	Robert Garfield Senior Vice President, SQFI rgarfield@fmi.org (202) 220-0633	
Karen Jones Manager, Web Development kjones@fmi.org (202) 220-0686	Gwen Lee Senior Manager, Food Safety Programs glee@fmi.org (202) 220-0661	HEALTH & WELLNESS & FMI FOUNDATION	Amanda Bond-Thorley Director, Education abondthorley@fmi.org (202) 220-0606	
Jessica Carpenter Administrator, Communications & Food Safety jcarpenter@fmi.org (202) 220-0638	Ashley Eisenbeiser Manager, Food Safety & Technical Services aeisenbeiser@fmi.org (202) 220-0689	Cathy Polley Vice President, Health & Wellness & Executive Director, FMI Foundation cpolley@fmi.org (202) 220-0631	Leann Chuboff Senior Technical Director, SQFI lchuboff@fmi.org (202) 262-6697	
Mary Kane Marketing Specialist mkane@fmi.org (202) 220-0667	GOVERNMENT & PUBLIC AFFAIRS	INDUSTRY RELATIONS & BUSINESS DEVELOPMENT	Lucas Darnell Director, Membership ldarnell@fmi.org (202) 220-0675	
John Lezcano Graphic Designer jlezcana@fmi.org (202) 220-0621	Jennifer Hatcher Senior Vice President, Government & Public Affairs jhatcher@fmi.org (202) 220-0734	Mark Baum Senior Vice President, Industry Relations & Chief Collaboration Officer mbaum@fmi.org (202) 220-0706	Laurie Gethin Director, Education lgethin@fmi.org (202) 220-0715	
Teena Pham Marketing Specialist tpham@fmi.org (202) 220-0608			Matt Grizzard Director, Membership mgrizzard@fmi.org (202) 220-0677	
			Suzanne George Senior Manager, Education sgeorge@fmi.org (202) 220-0820	
			Michael Farrell Specialist, SQFI Electronic Data Systems mfarrell@sqfi.com (202) 220-0665	
			Melody Ge Specialist, SQFI Compliance mge@sqfi.com (202) 220-0610	
			Kristie Grzywinski Technical Manager, SQFI kgrzywinski@fmi.org (202) 341-7932	

