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KEYNOTE SPEAKERS

MARTIN COLES

Martin Coles joined HaloSource as a member of the board in July 2011 and was appointed president and chief executive officer in October 2011. Prior to joining HaloSource, Martin Coles held the positions of chief operating officer and later president of Starbucks Coffee International. His career also includes 35 years of serving in a variety of senior executive and board positions at Procter & Gamble, PepsiCo, Nike and Reebok. He also served as a non-executive director at Levi Strauss. Mr. Coles began his career at Procter & Gamble UK in 1977 as a graduate-entry production manager. He currently serves on the not-for-profit International Education Advisory Boards of the University of Washington Business School at Bothell, previously serving as chairman of the UW Foster Business School Advisory Board and Seattle University, where he is a fellow of the Albers Business School.

JOHN GALLIGAN

John Galligan is the head of the Global Government Affairs team at Microsoft, which supports the company’s international team of corporate affairs professionals to promote Microsoft’s public policy agenda including cloud computing, privacy, security, search, and fostering a vibrant online ecosystem. Prior to this role, John was Regional Director for Government Relations in Asia Pacific. He was previously Director of Corporate Affairs & Citizenship for Microsoft Australia where he had responsibility for government and industry engagement, community affairs and the Company’s corporate citizenship strategy. Before joining Microsoft in 2006, John held the position of Director of Corporate and Regulatory Affairs at BAT Australasia and has occupied a number of senior advisory positions in Australian federal politics.

EILEEN SÁNCHEZ

Eileen Sánchez is the Director of Economic Development for the Los Angeles Mayor’s Office, overseeing the Small and Minority Business team, as well as a broad range of citywide entrepreneurship resources, programs and initiatives. Prior to joining the Los Angeles Mayor’s Office, Ms. Sánchez served as the U.S. Small Business Administration’s (SBA) Associate Administrator for International Trade in Washington, D.C. where she oversaw the execution, implementation and development of the State Trade Expansion Program (STEP) and of the SBA trade finance programs. These responsibilities included the oversight of teams, resources, budge and employment effectiveness of political appointees, senior-level managers, policy experts, and a nationwide network of field staff located at U.S. Export Assistance Centers. Ms. Sánchez served on various White House National Security Councils and U.S. Department of State policy committees, and collaborated with strategic partners in both government and private sectors in the United States and worldwide. She reported directly to the Administrator, a member of the President’s Cabinet, and served on the SBA Management Board.
SESSIONS AT A GLANCE ◊ THURSDAY, MARCH 30, 2017

7:00 AM – 5:00 PM
Registration & Tabletop Displays  Grand Pennington Foyer

7:30 AM – 8:30 AM
Breakfast and Networking  Grand Pennington Ballroom

8:30 AM – 9:30 AM
Keynote Speaker: John Galligan, Microsoft  Grand Pennington Ballroom

9:45 AM – 11:00 AM
I-A. Addressing Cultural Intelligence Improvement with Study Abroad  Early Bird Room
I-B. CGBP Exam Overview – What’s New & Improved  Elizabethan Room
I-C. The Need and Ways to Increase Exports by NTES  Isabella Room
I-D. How to Prepare for an Import/Export Audit  Lincoln Room
I-E. Franchising in the Emerging Global Economy  Marie Antoinette Ballroom
I-F. Trade Opportunities & Regulations in Sub-Saharan Africa  Worthy Room

11:15 AM – 12:30 PM
II-A. Global Entrepreneurship Internship – The Early Training of Future IBD Counselors and CGPSs  Early Bird Room
II-B. A Customs Broker License – How to Prepare Your Students for the Exam  Elizabethan Room
II-C. Business Growth Sectors and Trade Opportunities in Latin America  Isabella Room
II-D. Effective Use of Incoterms 2010 in the Sales Contract  Lincoln Room
II-E. US Economic and Trade Sanctions: An Introduction  Marie Antoinette Ballroom

12:30 PM – 1:45 PM
Lunch and Keynote Speaker: Eileen Sánchez, Los Angeles Mayor’s Office  Grand Pennington Ballroom

2:00 PM – 3:15 PM
III-A. Innovation in Collaboration: The International Business Education Alliance (IBEA) Fuels Your Success in the Classroom and Beyond  Early Bird Room
III-B. Trading with Africa: Why & How?  Elizabethan Room
III-C. How to Leverage Sister City Relationships for International Trade  Isabella Room
III-D. The Practical Side of International E-Commerce  Lincoln Room
III-E. Creation and Management of Export Consortia to Boost Export Sales of SMEs  Marie Antoinette Ballroom
III-F. NASBITE CGBP Recertification Program Update  Worthy Room

3:30 PM – 5:45 PM
Government Programs Spotlight Session  Grand Pennington Ballroom
Cultural Intelligence is what sets apart two candidates with similar resumes. It is becoming increasingly more common for employers to search for leaders who are culturally intelligent and able to lead a team no matter the cultural context. The number of jobs that require being adequate in a diverse work environment are rising. For this reason and many others, it is important for students entering the workforce to understand and be aware of how to work in diverse situations. The most effective way to understand other cultures is to have first hand exposure to them. Higher education institutions have increased their efforts to entice students to participate in study abroad programs. The drive behind this effort is the belief that international experiences improves cultural intelligence. From analyzing pre and post CQ Cultural Intelligence tests taken by college students who have studied abroad, it shows that there is at least an average 10% increase in the four areas of cultural development. This includes students drive to cross culturally adapt to diverse situations, understanding intercultural norms, strategically planning with diverse members, and appropriately acting in cross cultural situations. Although it is important for students to acquire this knowledge, the obstacles holding students back are often the cause behind the slow increase of participation. This presentation demonstrates how the internal cultural knowledge and external professional development deriving from international experience outweigh the costs of going global. The goal of this presentation is to encourage an increase in opportunities for students to pursue experiences abroad and understand the positive outcomes from doing so. If successful, college students who have global experience will have a higher possibility of standing out to employers because they encompass the ability to strategically and effectively lead a culturally diverse team.

This session will provide CGBP exam trainers and prospective candidates with the opportunity to learn about process improvements that have been made within the past year to add value and enhance the exam-taking experience for candidates.

This session provides an opportunity for CGBP trainers and prospective exam candidates to dialogue with CGBP Governance Council to gain insights into:

- Candidate experiences & feedback captured via the CGBP Post Exam Survey
- Process improvements made to enhance communication with candidates (pre- and post-exam)
- The newly developed “CGBP Exam Takers Guide“ - developed to assist candidates with navigation of the CGBP exam platform
- Future exam expansion initiatives
This presentation describes a pilot project led by the Milken Institute and Maurice Kogon to increase exports by new-to-export (NTE) firms. Federal assistance has focused on export-ready firms, to the virtual exclusion of harder-to-help NTEs. With U.S. exports actually declining, there is now recognition that export-ready firms alone cannot generate large export increases, and that much greater export growth could come from the 85% of manufacturers that are NTE. Not all NTEs have export potential, but any that have survived in the highly competitive U.S. market do, and they could realize it with dedicated and effective help. HR 5146 calls explicitly for a greater national NTE focus and sets goals holding USDOC accountable for results. Even if not passed, it sends a strong signal. The LA-based Milken Institute and Maurice have teamed up to launch a regional pilot initiative focused exclusively on NTEs. The project is supported by the key regional political, economic, and export assistance leaders, who also agreed to serve on the Project Steering Group. You will learn about the collaborative mechanism adopted; the outreach methods to attract up to 50 pilot NTE clients; the many organizations that for the first time have agreed to collaborate and coordinate; and the needed export services they each will provide to advance NTE clients seamlessly from start up to self-sustaining export operations. We believe the approach and methodology used here can serve as a model for any locality that sees value in getting more NTEs into the export base.

Do you know what to do in the event CBP (Customs) or BIS (Bureau of Industry and Security) shows up at your door? Have you ever had a request for additional information via fax or phone with CBP or BIS? Has another division of your company been interviewed or audited? Do you have written procedures showing each employee what to do if audited? What strategies can you implement across your firm to help reduce or minimize the potential impact of an audit?

This program will help prepare your company for an import and export audit. This program is a must for the experienced or first time importer/exporter to make sure you know what to do in the event of an audit. More importantly what you can do today, before an audit occurs. It will cover the roles and responsibilities that each importer/exporter must be aware of in order to avoid fines, delays and possible loss of import/export privileges. You will have an import/export checklist to guide you on what to be prepared for during an audit. We will provide all materials/handouts, checklists and on-line resources.

International franchising is a strategic way to reduce dependence on domestic demand and grow new, future revenue and profit centers worldwide. Extending a brand globally through franchising involves a low risk, requires minimal investment and offers a huge upside potential on scaling capabilities. Franchise businesses around the world have seen steady growth in the past decade, particularly in Brazil, China, Mexico and other emerging economies. According to the United States International Trade Administration, nearly 300,000 businesses with fewer than 500 employees exported from the United States, accounting for 97.5 percent of all U.S. exporters. Smaller Business Enterprises are more prone to expand through franchising than larger firms enterprises. This presentation discusses the pros and cons of international franchising as a small business. It also describes the various methods of entry into emerging markets through direct franchising, joint ventures and master licensing agreements.
The presentation describes Sub-Saharan Africa business environment with specific focus on three (3) major economies in each sub-region: Nigeria (West Africa), South Africa (Southern Africa) and Kenya / Ethiopia (East Africa).

It covers trade potentials, risks vs opportunities, trade policies, regional trade agreements and regulatory requirements.

It provides detailed understanding of the regional integration network (ECOWAS, SADC and COMESA) and how to leverage them to maximize trade opportunities across the Sub-Saharan African market.

The presentation gives an overview of economic reforms, institutional improvements, infrastructure and financial services.

It concludes with general recommendations to U.S. companies seeking growth opportunities in the African emerging markets on strategies and how to navigate volatility and compliance issues in the region.
SESSION PRESENTER(S):
Dr. Mike Seibert, CGBP, SBTDC North Carolina
Alex Viva, CGBP, SBTDC North Carolina

Presentation will specifically cover the planning, processes and execution of the highly successful student engagement program of the International Business Development (IBD) team of the SBTDC in NC. This past summer, we established two (2) paid internships whereby students work as junior International Business Development (IBD) counselors for the summer. IBD interns worked under the direction of Dr. Mike Seibert and their focus was on assisting the IBD team with advising client-companies on international business development.

The purpose of the internship program:
1. Clarify students' understanding and increase their mastery of international business and global entrepreneurship concepts in settings outside the physical classroom and in addition to the formal educational process. This internship allows students to be involved in the day-to-day operational routine of the SBTDC's IBD program, and to put into practice the concepts, methods, and techniques learned in the classroom. It also provides students with an opportunity to observe and interact with others who apply certified global business professional (CGBP) competencies on a daily basis.
2. Expand the students' counseling competency including knowledge, skills and attitudes needed to become a “trusted advisor” to client-companies. This internship facilitates “learning transfer” by having students practice what they have learned in the classroom. In addition, students learn how to develop productive working relationships with client-companies as their trusted advisor.

SESSION PRESENTER(S):
Shawn Levesen, Austin Community College

There's no question - Having a customs broker license gives students an advantage when looking for a job. At Austin Community College we teach a course to familiarize students with import customs regulations and prepare students desiring to take the customs broker exam. Many students use the course for exam preparation but others use it to take on new responsibilities at work, get promotions and find positions that wouldn't have been open to them before the license. In this presentation, we'll go through customs material (the Code of Federal Regulations Part 19, The Harmonized Tariff Schedule, and other documents), how the exam is structured and a format for teaching the subject matter. On top of that, we'll cover techniques for taking the exam that all but ensure success.

SESSION PRESENTER(S):
Janet Bauermeister, US Department of Commerce, Washington State
John Brislin, Export Import Bank of the US
Dr. Mary McKinney, CGBP, Duquesne University SBDC
Brent Rondon, CGBP, Duquesne University SBDC

II-B: A Customs Broker License - How to Prepare Your Students for the Exam ◊ Elizabethan Room

II-C: Business Growth Sectors and Trade Opportunities in Latin America: A Panel Discussion ◊ Isabella Room
The rapid development of Latin America and rising wealth of the middle class have resulted in unprecedented growth rates, an urgent need for infrastructure development and increasing rates of imports. These conditions offer an immense opportunity for US firms exports which are typically in high favor among Latin American businesses. US products are known in Latin America for their high quality and reliability, aspects in which our large competitor in the market, China, has not typically excelled.

This proposed panel discussion will feature representatives from: the U.S. Department of Commerce discussing the latest export information on key markets in Latin America including rising market opportunities; EXIM Bank, presenting EXIM programs for Latin America; a private company export manager discussing the firms successful exporting experience and use of EXIM Bank financing to export to Peru and other countries; and IMPACT Project leaders discussing their participation with US firms in events in Latin America including trade shows i.e. Expomin in Chile, Expomina in Peru; matchmaking, i.e. Trade Winds, and conferences as well as developing relationships with a major university in Peru. They will also outline 2017 program offerings for US firms to participate in trade shows and missions in Mexico, Chile, Peru and Colombia. The panel will encourage US companies to travel to do business in these growing markets. Trade shows are bustling with firms from the global community doing business in these countries. Too few US firms are taking advantage of available trade incentives to participate in shows to market to Latin America.

II-D: Effective Use of Incoterms 2010 in the Sales Contract ◊ Lincoln Room

➤ SESSION PRESENTER(S):
  Karen Dunlap, CGBP, Dunlap International, Inc.

Everyone thinks they know Incoterms, yet most sales contracts are inconsistent in their integration of shipping and payment terms, thus creating potential legal conflicts. This presentation will focus on Incoterms 2010 to evaluate the sales contract, various subsidiary contracts, and payment terms; with a heavy emphasis on Letter of Credit payment terms. We will review each of the 11 Incoterms discussing modes of transport, when delivery legally occurs, differences between the Uniform Commercial Code vs. Incoterms, routed transactions, division of costs and risks, and insurance risks, supplemented by personal experiences. This seminar is valuable for exporters, importers, trade specialists, bankers, lawyers, and educators, as it focuses on the sales contract itself, whether a formal written documentation or a simple offer and acceptance. Effective use of Incoterms simplifies communication of many important contractual issues and helps avoid problems.

II-E: US Economic and Trade Sanctions: An Introduction ◊ Marie Antoinette Ballroom

➤ SESSION PRESENTER(S):
  Grant Leach, Husch Blackwell

All U.S. exporters are required to comply with the sanctions programs administered by the U.S. Department of the Treasury, Office of Foreign Assets Control (OFAC). Without awareness, specific procedures for compliance, and vigilance, exporters can easily find themselves in violation of the OFAC sanctions, which carry significant civil and criminal penalties. In this panel discussion, we will focus on the development of U.S. economic and trade sanctions, as well as best practices for ensuring compliance with an ever-changing sanctions regime. Speakers will include government officials and private practitioners.
As an international business instructor, do you ever wish you could brainstorm ideas or share materials with others in the field? Do you have students asking how to further their learning in areas that your institution may not offer? Are you passionate about global trade and want a way to share your enthusiasm with others in the industry? The newly enhanced International Business Education Alliance (IBEA) is here—a free, online collaborative designed to increase international business education, training, and employment opportunities by connecting colleges, students, and companies. Due to popular demand, it now features the IBEA HUB—a secure, interactive environment where faculty can post and find industry-specific resources. Funded by a California Workforce and Economic Development grant and the Doing What MATTERS for Jobs and Economy Initiative, IBEA is innovating how the international business sector connects, collaborates, and succeeds by encouraging program cross-promotion, eliminating skills gaps in the industry, and creating community. Each of these areas is fueled by an overarching commitment to improve student outcomes for CGBP certification and career placement. Come get an inside look at IBEA and discover the many benefits of membership for you, your institution, and your students.

During the summer of 2016, the University of Iowa hosted its first cohort of Mandela Washington Fellows for a six-week training in business and entrepreneurship. There were 25 Fellows from 18 different sub-Saharan African countries. The Mandela Washington Fellowship Program is President Obama’s flagship program for Africa as part of the Young African Leaders Initiative (YALI). Iowa companies were surprised to learn from the Mandela Fellows of the abundant trading opportunities that can be developed with Africa. This presentation will elaborate on some of the key sectors that US companies can penetrate in different countries in Africa. The presenter will explain why the continent of Africa offers lucrative markets to US companies. Finally, the presenter will discuss the entry modes into African countries.

Washington State SBDC and Grant County EDC have successfully used Sister City relationships in rural Eastern Washington communities to develop successful in-bound and out-bound International Trade events for small and medium sized businesses. Using WSBDC Trade Specialist and market research regarding South Korean import demand for Value added Agriculture Products, Distilled Alcoholic Beverages, Organic Flour, Distilled Lavender Oils and Exercise Equipment the Grant County and Adams County EDC showcased local business during the Gunpo Sister City In-bound visit to Moses Lake, WA.... then followed up with an Out-bound trade event to Seoul, and GunPo Korea where Six Eastern WA businesses met with at least (5) Korean buyers interested in their U.S. products.

This presentation will share best practices for identifying foreign market Export opportunities for rural businesses combined with how to use of the Korean International Trade Association (KITA) to turn an existing Sister City relationship...
into a successful out-bound trade event with face-to-face business meetings in Seoul, Korea. Presenters will provide case study analysis of the specific rural businesses involved in these trade events along with challenges, failures and successes. The Washington State SBDC has developed a basic export readiness model for repeating these In-bound and Out-bound trade events that will be shared with workshop participants.

### III-D: The Practical Side of International E-Commerce

**SESSION PRESENTER(S):**
Ray Bowman, CGBP, Los Angeles SBDC Network
Marianne Rowden, American Association of Exporters and Importers

The aim of this workshop is to give participants an overview of the trends, considerations, compliance and logistics issues that surround the growing world of ecommerce. All too often we hear about the opportunities of e-commerce without looking at some of the practical issues surrounding the launch of a successful e-commerce strategy. This is especially true for those thinking about entering the competitive Asian e-commerce markets.

### III-E: Creation and Management of Export Consortia to Boost Export Sales of SMEs

**SESSION PRESENTER(S):**
Mark Wocial, CGBP, Wocial & Associates LLC

Export consortia are a powerful strategic tool designed to help SMEs overcome many barriers to exporting, such as limited managerial capabilities, inadequate knowledge of foreign markets, and constraints on operational, financial, and marketing resources.

An export consortium is a voluntary alliance of firms with two key objectives: promoting the goods and services of its members abroad, and facilitating the export process. Export consortia allow member firms to pool their resources for production, logistics, market development, and marketing activities, enabling them to strengthen their competitiveness in international markets. They offer risk reduction, efficiency gains, and improved profitability for the participating firms. Studies show that members of export consortia export more goods to more countries than comparable firms that do not take advantage of this strategic tool.

This presentation will discuss different types of export consortia and their strategic characteristics. It will examine the process of creating an export consortium, its organizational structure, and a framework for consortium management and governance. Funding of an export consortium, services provided to the member firms, and tools for monitoring performance will be discussed. Throughout the presentation, the audience will have the opportunity to learn about specific examples of successful export consortia from around the world.

The concept of export consortia is currently underutilized by SMEs and merits greater consideration from the business community, and organizations involved in export support and international business education to promote exporting.

### III-F: NASBITE CGBP Recertification Program Update

**SESSION PRESENTER(S):**
Jim Foley, CGBP, Turner Center for Entrepreneurship

The CGBP recertification program has been in effect for a number of years. As part of Nasbite's strategic plan, we are looking at ways to adapt the recertification policies to best fits the needs of CGBPs. We have also been addressing the issue of how to engage CGBPs that are no longer in-status with their recertification. Please join this session as we discuss our efforts thus far so you can learn of the latest changes, and provide your feedback.
The SBA: Smart, Bold, and Accessible for US exporters
- Danielle Wilsey, CGBP, Regional Export Development Officer, SBA
- Lee Gibbs, International Trade Finance Manager, SBA

The SBA’s Office of International Trade works in cooperation with other federal and state agencies as well as public- and private-sector groups to encourage small business exports and to assist small businesses seeking to enter the International Market Place.

The purpose of the session is to provide an overview of the newly expanded breadth and depth of SBA’s export products and services for US small businesses.

- Enhancing Coordination in the Export Promotion Ecosystem: Delivering Value to Clients
  - Tricia Van Orden, US Department of Commerce (moderator)
  - Scott Goddin, US Department of Commerce
  - David Kohl, Oregon Small Business Development Center Network Global Trade Center

A multitude of offices and programs provide products and services to prepare U.S. companies to export, either for the first time or to new markets. In a climate of limited budgets, staff, and resources, all stakeholders in the export ecosystem must work together to leverage and enhance each other’s offerings, always keeping in mind the ultimate goal – increase U.S. exports to create and sustain U.S. jobs.
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<td>IV-A. Three Models for Designing a Faculty-led Study Abroad</td>
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<td>IV-B. Navigating the US Export Control Labyrinth</td>
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<td>IV-C. Foreign Market Selection: Best Practices from the Florida SBDC</td>
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<td>IV-D. Value-Adding Opportunities of Logistics Hubs in Central America</td>
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<td>IV-E. Foreign Distributors – The Other Side of the Story</td>
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<td>IV-F. NAFTA + 3 Free Trade Agreements</td>
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<td>V-A. How to Engage High Schools in Global Trade Awareness</td>
<td>Early Bird Room</td>
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<td>V-B. Not Just Big Data – Global Data!</td>
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<td>V-C. Market-driven Export Pricing Strategies</td>
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<td>V-D. Building an Infrastructure for Credit Decisions in a Global Market</td>
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<td>V-F. Built for Global - Navigating International Business &amp; Entering New Market</td>
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<td>Lunch and Awards Ceremony</td>
<td>Grand Pennington Ballroom</td>
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<td>VI-A. Trade Finance and US Government Digital Export Assistance Resources</td>
<td>Early Bird Room</td>
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<td>VI-B. Experiences of Students Working for Michigan Export Growth Program</td>
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<td>VI-C. Managing the Cost of Foreign Exchange Risk: Options and Forward Contract Pricing</td>
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<td>VI-D. Metro Chicago Exports – A Roundtable</td>
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<td>A Collaborative Discussion on Establishing a Sustainable CGBP Training Program</td>
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<td>Membership Meeting &amp; Closing Reception</td>
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Faculty-led study abroad is a popular means for both faculty and student to spend time abroad developing holistic global skills that enable them to understand and successfully navigate across different cultures, contexts and worldviews. While an increasing means for faculty and student immersion, designing a productive and cost-effective faculty-led study abroad can be challenging. This presentation will propose three models for the development of faculty-led study abroad, discuss the process for developing a cost-effective approach and lessons learned from previous study-abroads comprising four different continents. The goal is for an interactive conversation with the audience as well on what has worked and not worked in study abroad programs.

This presentation will explore the broad topic of export control, and explain how companies can navigate the US trade compliance system without being blind-sided, fined, or worse. As a general rule, the United States government encourages American companies to export their goods and services. This helps them to make a profit, and improves the nations trade balance. However, a relatively small portion of US products are subject to export controls, and there are also a few countries, companies, and people that we cannot ship to. These controls may stem from concerns about national security, nonproliferation, foreign-policy, short supply, crime, or terrorism.

There are basically three US government agencies that administer export controls:

- **International Traffic in Arms Regulations (commonly referred to as ITAR)** are administered by the State Department. They govern the export of all types of military weapons and technology. ([http://www.pmddtc.state.gov/index.html](http://www.pmddtc.state.gov/index.html))
- **Export Administration Regulations (or EAR regulations)** are overseen by the Commerce Department Bureau of Industry and Security. They govern products which are considered potentially dual-use. In other words, products that may have both civilian and military applications. ([https://www.bis.doc.gov/](https://www.bis.doc.gov/)) And finally...
- **The Office of Foreign Assets Control (or OFAC)** within the Treasury Department oversees all US boycotts, sanctions and embargos. ([http://www.treasury.gov/ofac](http://www.treasury.gov/ofac))

We will dive deeply into the websites for these agencies, exploring how their controls work, when they apply, and how to access some excellent online compliance tools and resources. This will include a discussion of how some superficially innocent items may be considered as dual-usage, and are thus subject to EAR controls. Our goal is to equip the attendees with the knowledge to properly advise their clients so they can safely navigate the export control labyrinth.
Foreign market selection is both a science and an art. Beyond limited resources, time, and expertise, the sheer volume of trade data and industry reports can discourage small business exporters from developing a strategic international expansion strategy. Recognizing this challenge, the Florida SBDC Network Export Marketing Plan Service was created to better serve its growing small-to-medium-sized export clients across the state. The nationally-recognized program, now in its fifth year of operations, brings together three primary export support agencies in Florida-SBDC Network, Enterprise Florida International, and U.S. Commercial Service-who partner to provide the expertise, guidance, and financial incentives to connect participants with the right foreign markets.

In this presentation we introduce attendees to the Export Marketing Plan Service and explain how the program operates with real world case studies. The discussion is geared toward experienced SBDC consultants, economic development professionals, and small business representatives actively engaged in developing international market strategy and selection. Additionally, sample export marketing plans will be available for participant review.

### IV-D: Value-Adding Opportunities of Logistics Hubs in Central America and the Caribbean  ◇  Lincoln Room

- **SESSION PRESENTER(S):**  
  Jeanne-Marie Lawrence, CGBP, East Carolina University

Concurrent with the Panama Canal expansion project, and the resultant opening of a new set of larger locks in June 2016, some of the countries in Central America and the Caribbean have developed extensive plans for improving the competitiveness of their logistics infrastructure in anticipation of increased trade flows. An understanding of the value that ports and logistics hubs can offer helps firms to design more competitive global supply chains to meet the needs of the ultimate consumer. This presentation will discuss the role of logistics hubs in global supply chains; the stages of maturity of a logistics hub; tools for determining the competitiveness of a country's logistics infrastructure; and the factors that should be taken into consideration when making port and logistics hub selection decisions. The presentation will also provide an overview of port and logistics hub development in Panama, the Bahamas, Cuba and Jamaica. This presentation will be helpful to those who are considering designing or re-designing their global supply chains to augment customer value.

### IV-E: Foreign Distributors - The Other Side of the Story  ◇  Marie Antoinette Ballroom

- **SESSION PRESENTER(S):**  
  Alex Viva, CGBP, SBTDC North Carolina

Much has been covered at past NASBITE conferences and CGBP Training on how to identify, select, contract and motivate a foreign distributor, but what about what the foreign distributor is looking for in a vendor/partner. This session looks at the relationship from the Foreign Distributor point of view and how to build a mutually beneficial relationship. We will cover areas such as:

- How to make your company attractive to Foreign Distributors
- Marketing Development Funds and Co-Ops and Channel Development
- Pricing, Landed Costs and Added-Value – keeping product competitive
- Importing goods – what they need from you
- Maintenance, Repairs and Inventory Control – how to handle
- Payment Terms – mutual risk mitigation, fx issues
- Porter’s Five Forces – when the buyer, in this case distributor, has the power

The scope of the session will rely on the presenter’s 30 years of experience managing foreign distributors as well as active participation and input from attendees. We will share personal experiences and learning points of both successful and challenged interactions to reach a mutually beneficial relationship.
How many times have you shipped to Canada/Mexico and simply filled out a NAFTA certificate based on your customers instructions? Did you have any supporting documentation showing how you researched the rules of origin and obtained any manufactures affidavits proving your goods qualify for NAFTA? Have you documented your research on your bill of materials as to how your goods qualify? Do you know if your goods have a duty associated with them or where to go to get this information? Are you aware of the 3 FTAs (Panama, S. Korea and Colombia)? If not come and learn about the differences between them and NAFTA.

This program will help you be in full compliance with all NAFTA regulations. You will know where to go and what to look for to be able to determine if your products qualify for the benefits of NAFTA. Most companies are exposing themselves unnecessarily to NAFTA penalties. In some cases your goods have low or zero duty already and therefore no need to exposure your company to potential NAFTA violations or to fill out a NAFTA certificate if your goods do not qualify. You will have an overview of the 3 FTAs (Panama, S. Korea, Colombia).

FTAs are one of the easiest ways to turn compliance into a sales opportunity. By determining what your duty rate and then determining if you can save your customer that duty, you are lowering your landed cost into a country.
How can we help high school students gain awareness of global trade quickly and easily to support an ongoing pipeline of workers in the industry? That's what we've explored since 2013 by pairing a high school module and micro-internship program that engages students, teachers, career counselors, and industry partners. The T-Shirt that Travels the World Module is a fun and interactive way to integrate global trade concepts into most any high school curriculum by tracing the life of a t-shirt through the global economy. Global T Immersion micro-internships provide students a hands-on experience in global trade in just three hours, enabling students to apply what they learned from the T-Shirt module to solve a global trade problem that the host company faces. They engage with global trade professionals and learn about educational and career opportunities in the global trade and logistics industry. We will share best practices and ways for implementing these or similar programs in your region.

Though many aspects of trade have been transformed in the past couple of decades, one of the most impactful has been in trade data. There has been a remarkable increase in the quality, reliability, and affordability of data to support trade expansion decisions. Companies and the trade assistance community no longer have to make decisions based on old, incomplete data. As the quality and depth of data increases, costs have decreased. This joint presentation by James Foley (NASBITE International, Bradley University) and Aric Saulka (Euromonitor International) will look at our favorite data sources, explain trends in trade data, look at the impact of big data, and offer our thoughts on the future of international trade intelligence.

This session will provide an overview of the tools and strategies associated with pricing for export markets. The focus will be on market-driven decision-making, export pricing, internal cost considerations and overhead allocations. In particular, this workshop will focus on variable pricing strategies that will be most useful for producers and exporters of goods (not services) and it will be most relevant to companies that have excess production capacity or trainers/consultants who are working with manufacturers that have excess production capacity.

Credit decisions in a global environment are more complex than making a go-no go decision on credit in a strictly domestic environment. There are more options for structure, and there are more risks present in the global marketplace. There are factors to consider that don’t exist inside the boundaries of a single country.
Proposal is to take a look at a structured approach to determining a company’s appetite for risk, based on drivers like growth, opportunity, financial strength and availability of risk mitigants. Hopefully this process will involve top management, so that sales and credit management can have an agreed upon mechanism for approving the structure of customer relationships.

Tactics for understanding market risks, including political risk, commercial and collection risk are proposed to be included. Also, risk mitigation techniques, including mechanisms for understanding the credit worthiness of a customer, transactional structure like documentary collections, and credit and political risk insurance as ways to limit risk would be covered.

Anyone can go global ... the hard part is to do it profitably with high standards. Robert Pearlstein, Vice President of Global Business Development for SRI International (former Stanford Research Institute) will discuss the essentials of business development surrounding innovation and advanced technologies in overseas markets. His presentation will share the importance of establishing value, minimize risk, find guidance, and build trust in foreign markets as you go about scouting, qualifying, and capturing customers in a new country.
This session brings together representatives from the U.S. Commerce Department’s International Trade Administration (ITA), the federal government lead export promotion agency, and the Export Finance Assistance Center of Washington, a state funded non-profit organization specializing in providing trade finance counseling, to discuss the resources available to U.S. small and medium-sized enterprises (SMEs) that are interested in entering, growing, and succeeding in global markets for their export business and financing needs. Participants will learn about: (1) U.S. Commerce Department’s Market Development Cooperator Program, a matching grant program that has helped to generate more than $9 billion in U.S. exports; (2) how to finance and get paid for sales; (3) program and resources available at U.S. government export financing agencies; and (4) how to access and utilize U.S. government-backed trade finance solutions when commercial financing is not available for export sales. In addition, participants will also learn about ITA’s Office of Digital Initiatives (ODI) and its work to improve the delivery of “digital client assistance” on www.export.gov and to reach more U.S. SMEs through digital engagement campaigns. ODI manages the Department’s government-wide export assistance portal -- export.gov and leads ITA efforts to create new digital trade education and market intelligence resources for SMEs. During the session, participants will be invited to join an export.gov “super users” group to provide in depth feedback on improving the web site. The session will also present new trade education video campaigns (Basics, Target Markets, eCommerce) that ITA would like to engage partners on.

Michigan Export Growth Program (MEGP) is a Pro Bono service implemented by the Michigan State University’s International Business Center in the Eli Broad College of Business. The program aims to help small to medium size Michigan businesses engage in the global marketplace by providing international market research reports customized to the needs of these businesses.

MEGP involves faculty and staff, who provide a few hours of free service to local businesses to assist them in taking the best possible advantage of opportunities in the global marketplace. Also, student assistants are an important part of the program as they put a significant amount of time searching the university sources for the most relevant international market information available, preparing the market research reports, and also, communicating findings with the companies. These students gain extensive experience by working in a business-like environment and by getting exposure to the fundamentals of international business. Their jobs at MEGP help them be successful in their coursework, guarantee rewarding internships and be substantially efficient during their internships. And eventually, their experiences in the program help them find their dream jobs.

With this session/panel, we would like to share the experiences of these students from their own perspectives, and present our best practices and experiences with the institutions that aspire to build similar programs nationwide. Two student assistants who are working as the MEGP project team leads for the 2016-2017 academic year will be invited to this session to share their experiences about the program, and also, to explain how they benefited by being a part of this valuable initiative.
Managing exchange rate risk can involve making choices among various foreign currency market contracts. When is it better to use a forward contract or an option? Is there any way to reduce the up-front costs of purchasing an option contract? An economist and a banker will explain and examine the various choices small and medium sized enterprises face in implementing a foreign currency hedge.

Metro Chicago Exports is a collaboration between the seven counties in Northeastern Illinois (Cook, DuPage, Kane, Kendall, Lake, McHenry and Will) and the City of Chicago to increase exports from small and medium-sized companies and to support regional job growth. Created by the Chicago Regional Growth Initiative’s working group in September 2014, Metro Chicago Exports is a strategic economic development program and is part of the region’s broader business retention and expansion strategy. Our program is a component of the metro Chicago area’s export development plan in conjunction with the Global Cities Initiative – a joint project of the Brookings Institution and JPMorgan Chase, which helps leaders in U.S. metropolitan areas reorient their economies toward greater engagement in world markets.

Metro Chicago Exports has also partnered with other leading Illinois-based and national organizations to help facilitate exporting, including the Regional Export Promotion Program (REPP) which brings state, county, and local nonprofit economic development entities together with the Export-Import Bank of the United States with a focus on increasing awareness of export opportunities. Metro Chicago Exports has also signed Memorandums of Understanding with the U.S. Commercial Service, U.S. Department of Commerce, the Export-Import Bank of the United States and the Illinois Manufacturing Center of Excellence (IMEC).
PANELISTS:
Katie Arroyo, International Trade Specialist with Florida SBDC at UNF
Chris Schrage, Marketing Instructor at University of Northern Iowa
Gabe Shweiri, Professor at Santa Ana College

Join your colleagues from across the country for a collaborative session about aligning your educational and career training programs with the industry standard CGBP Credential. Bring your experiences, successes, challenges, questions, needs and goals. We want to hear from you and share with you!

Who should attend? Current providers of NASBITE-accredited training programs; the Dean or representative of International Business, International Logistics, and International Studies programs.

Our goal is to bring together current NASBITE-accredited training program representatives with educational partners to explore whether the NASBITE CGBP would align with your international business and career training programs.

What you will take away:
- Testimonials from current successful NASBITE-accredited training programs
- Examples of how these programs have enhanced international curriculum and advanced students' careers
- An understanding of the range of options to roll out a NASBITE CGBP training program

FRIDAY, MARCH 31, 2017 ◊ CLOSING EVENTS ◊ 6:00 PM – 9:00 PM

On Friday, March 31st, NASBITE Conference attendees and Members will come together to celebrate, network and enjoy Spokane’s Mobius Science Center, a unique venue that will provide amazing views of the river and falls. Elections for the 2017-2018 Board of Governors and other Member business will be conducted. There will be plenty of heavy hors d’oeuvres and a cash bar available (don’t forget the drink tickets from your registration packet; your first two beverages are included)!

Location: Mobius Science Center, 331 N. Post Street, Spokane (just a short 7-minute walk from the Historic Davenport Hotel)

Directions: Departing from The Historic Davenport Hotel, head north on S. Post Street toward Sprague Avenue. Cross W. Main Avenue and walk through River Park Square shopping complex to exit on W. Spokane Falls Boulevard. Cross the Boulevard and follow N. Post Street.

In case of inclement weather, announcements for transportation options will be made.