

Welcome to the 2025 Leadership Conference





The Hon. Lisa Disbrow

Chair, NDIA Board of Directors



Jen Stewart

Executive Vice President, Policy & Strategy, NDIA



Strategy & Policy Update

Jen Stewart
EVP, Strategy & Policy



Leadership

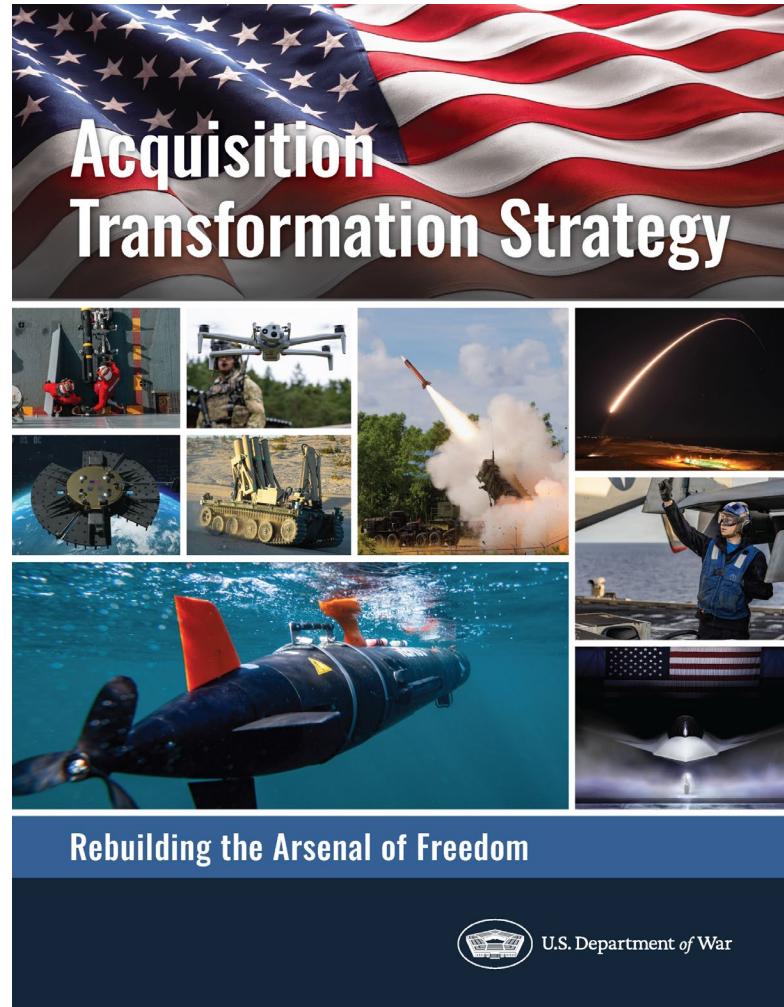
- Jen Stewart, Executive Vice President, Strategy and Policy
- Michael Seeds, Senior Director, Strategy and Policy
- Lorenzo Williams, Senior Director, Strategy and Policy
- Chris Sax, Associate Director, Strategy and Policy

Associates

- Anthony Borda, Strategy and Policy Associate
- Mike Harris, Strategy and Policy Associate
- Jack Mellody, Strategy and Policy Associate
- Alex Pennoyer, Strategy and Policy Associate
- Riley Van Steenberg, Regulatory Policy Associate
- Brennan Greeves, Research Associate
- Emma Schroeder, Executive Assistant (Jen and David)



- Shutdown/Continuing Resolution
 - Member Guidance, Hill Engagement
- Acquisition Reform
 - Hegseth Memo, NDAA





Strategic Pillar	Provision(s) ¹	Green (Support or Neutral)	Orange (Oppose w/o Changes)	Red (Oppose)	Purple (Members Split)
Balanced Approach for Open Competition	H.R. 3838, Section 1825. S. 2296, Sections 821, 823, 824, 825, 826, 827, & 828.	N/A	N/A	N/A	8
Restoring Industrial Readiness Powerhouses	H.R. 3838, Sections 801, 802, 803, 804, 805, 806, 808, 811, 813, 818, 833, 835, 836, 1602, 1821, 1822, 1823, 1824, 1831, 1842, & 2809. S. 2296 Sections 822, 831, 832, 833, 835, 838, 839, 867, 868, 875, & 6027.	19	N/A	6	N/A
Advancing DoD Digital Modernization and Transformation	H. R. 3838, Sections 863, 892, 1832, & 1833. S. 2296, Sections 804, 836, & 1564. ²	5	N/A	2	N/A
Ensuring Resilient Supply Chains	H. R. 3838 Sections 815, 852, 855, 864, 870, 873 1843, & 1844. S. 2296 Sections 843, 846, 861, 863, 867, 869, & 879.	9	1	3	N/A
Modernizing Foreign Defense Trade and International Technological Competition	H.R. 3838 Sections 1077 & 1703. S. 2296 Sections 874 & 908.	4	N/A	N/A	N/A
Total	57	37	1	11	8

- Continuation of SPEED and FoRGED Acts
- Goals:
 - Reform defense acquisition
 - Reduce barriers to entry
- Contains tension points from SPEED and FoRGED:
 - Further divides DIB
 - Doesn't reduce barriers he evenly



- Shutdown/CR/Reconciliation
 - Member Guidance, Hill Engagement
- Acquisition Reform
 - Hegseth Memo, NDAA
- IP and Data Rights
 - IP White Paper, Hill Engagement
 - Coordination with Associations
- Defense Trade
 - HFAC Task Force Briefing, White Paper
- SBIR/STTR Reauthorization

NDIA
2101 Wilson Boulevard, Suite 700, Arlington, VA 22201-3060 • (703) 522-1820 • NDIA.org

**IP and Data Rights:
Protecting DoD's Access
to Innovation**

White Paper

September 2025

NDIA SBIR/STTR Reauthorization



- Expired on September 30, 2025
- Engagement with Small Business Division
 - ML Mackey, Chair, Testified in **February**
 - SBIR/STTR White Paper in **June**
 - Engagement with 4 Corners: **February – November**
 - SBIR/STTR Extension Letter in **September**
 - NDAA Conference Letter in **October**



NDIA S&P Working Groups



- Defense Industrial Base
- Artificial Intelligence
- Intellectual Property
- Minerals and Materials
- **New: Maritime Industrial Base**





Vital Signs 2026

Vital Signs 2026 will continue to build on our success



Synergistic Partnerships	Funding	Digital Modernization	Defense Trade	Industrial Readiness	Supply Chains
Assessing the Challenges	CRs, Stop-Work Orders	IP and Data Rights	Modernizing & Streamlining FMS	Restoring Industrial Readiness	Resilient Supply Chains
DIB Financial Analysis	Funding Instability	Cybersecurity	Leveraging Direct Commercial Sales	Workforce	Harmonization
IRAD	Inflation	AI and Autonomy	International Security Partnerships - AUKUS	Skilled Labor	Critical Minerals and Materials
Novel Approaches		Small Business Concerns	International Regional Frameworks - PIPIR	Munitions	
Private Capital Financial Analysis		SBIR & STTR	Dual-Use Export Controls		
		Tax R&D Amortization			
		Authority to Operate			
		Space			
		JADC2			

New for 2026

New in 2025

Updated



- Survey respondents:
 - Last year = 1273
 - This year = 1595~
- Our largest pool of respondents to date
- Thank you for your support!

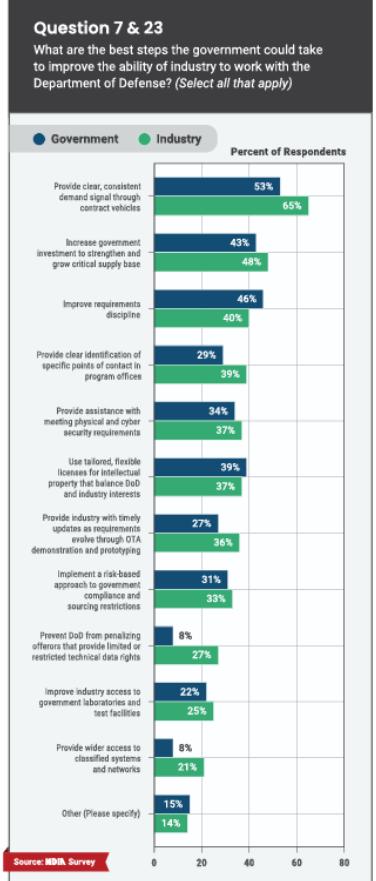


NDIA VITAL SIGNS 2025

Recommendations:

Short-Term

1. DoD and Congress must continue to make more substantial, sustained, and predictable financial investments to rebuild the U.S. DIB's strategic endurance and resilience. As reasserted in DoD's Fiscal Year 2020 Industrial Capabilities Report to Congress, the order of magnitude of financial investment is in the billions, not millions, of dollars.
2. DoD and Congress must transform the inflexible programming, budgeting, and appropriations process, as recommended by the Planning, Programming, Budgeting, and Execution (PPBE) Reform Commission.
3. DoD and Congress must examine the application of cost and pricing data requirements by either raising the threshold or providing contracting officers additional flexibility. One of the most particularly cumbersome regulations for NDIA member companies of all sizes is the requirement for certified cost or pricing data. The burden of cost or pricing requirements could be ameliorated either by raising the Truthful Cost or Pricing Data Act (formerly known as the Truth in Negotiations Act (TINA)) threshold or by granting contracting officers additional authorities to tailor these requirements to specific procurements, including allowing contracting officers to rely on historical data of recent prices paid in determining costs of a subcontract, a purchase order, or a modification of either.





Member Value



Thought Leadership

What S&P does

Drives public perception, crafts key narratives, and provides education about the DIB

Member Value

Provides public platform to highlight industry issues

Examples

Vital Signs
Speaking Engagements
Surveys
Defense Science Board TF21

Government Engagement

Engages with Congress, DoD, and other bodies in constructive dialogue

Opportunity to ethically engage with government officials

Regulatory and Legislative Inputs

Submits comments and recommendations to regulatory and legislative proposals

Tracks and posts NDIA submissions

CMMC
ITAR
AI RFI

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- 1 Prioritizing Sufficient and Stable Budgets**
- 2 Advancing DoD Digital Modernization and Transformation**
- 3 Modernizing Foreign Military Sales and Technology Cooperation**
- 4 Restoring Industrial Readiness Powerhouses**
- 5 Reinforcing Resilient Supply Chains**



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Examples

Vital Signs
Speaking Engagements
Surveys
Defense Science Board TF21

CODSIA
Wargames
Invite-only Engagements

CMMC
ITAR
AI RFI



Wednesday, April 09, 2025



S&P Overview

1. The S&P Team has released a [Tariff Dashboard](#), with baseline tariff rates as well as rates for certain items and commodities. This tool will be built out further in the coming weeks.

In this issue:

[Supply Chains](#) | [Budget](#) | [AI](#) | [Munitions](#) | [Navy](#) |
[On The Hill](#) | [Regulatory Tracker](#) | [Other Updates](#)

11/25/2025

Innovation



iStock illustration

Lowering innovation barriers has been a discussion point recently, from both our [international allies](#) and in the halls of [Congress](#). Recently Australian officials have discussed their difficulties with the [Excluded Technology List](#), even with the AUKUS framework. Also this week, Rep. Don Bacon wrote an [op-ed](#) about the future of US innovation.

Read More:

[CSIS: The Tech Revolution and Irregular Warfare: Leveraging Commercial Innovation for Great Power Competition](#)

[CSIS: Bringing the Private Sector to Space](#)

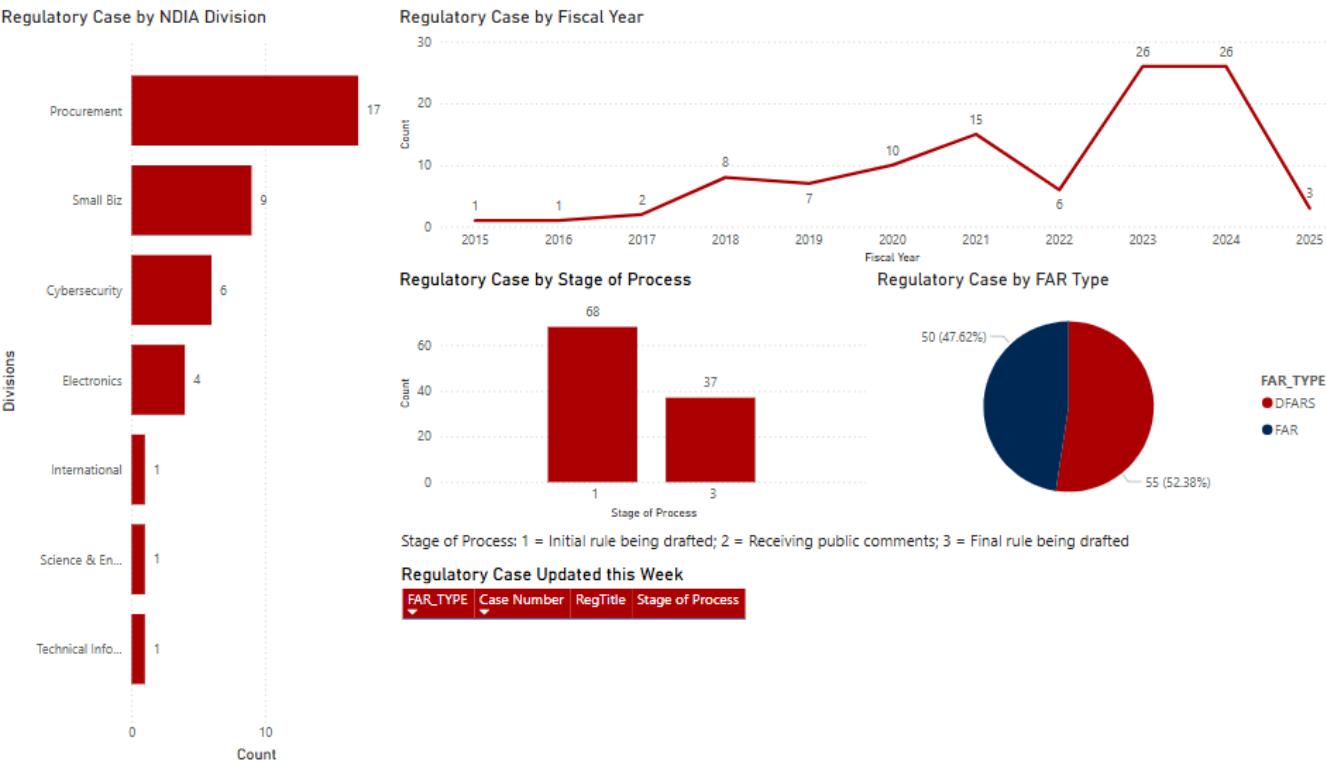
Get Involved:

NDIA's Science and Engineering Technology Division provides a venue for discussion of the nation's defense needs by examining existing capabilities and suggesting ways to overcome deficiencies in defense research and development (R&D). You can learn more about the Division and join the discussion [here](#).

NDIA Regulatory Tracker



- Automatically tracks and updates FAR and DFARS cases weekly
- Enables members to see what is proposed, when, and stage of process
- Now includes Class Deviations



Class Deviations Tracker

Class Deviations	Date	Status Updated
Class Deviation 2025-O0005 – Prohibition on Procurement of Paper Straw	(6 March 2025)	No
Class Deviation 2025-O0004 – Revocation of Executive Order on Sustaina	(7 March 2025)	No
Class Deviation 2025-O0003 – Restoring Merit-Based Opportunity in Federal Contracts	(4 March 2025)	No
Class Deviation 2025-O0002 – Waiver of Project Labor Agreement Requirements	(7 February 2025)	No

NDIA Regulatory Submission Tracker

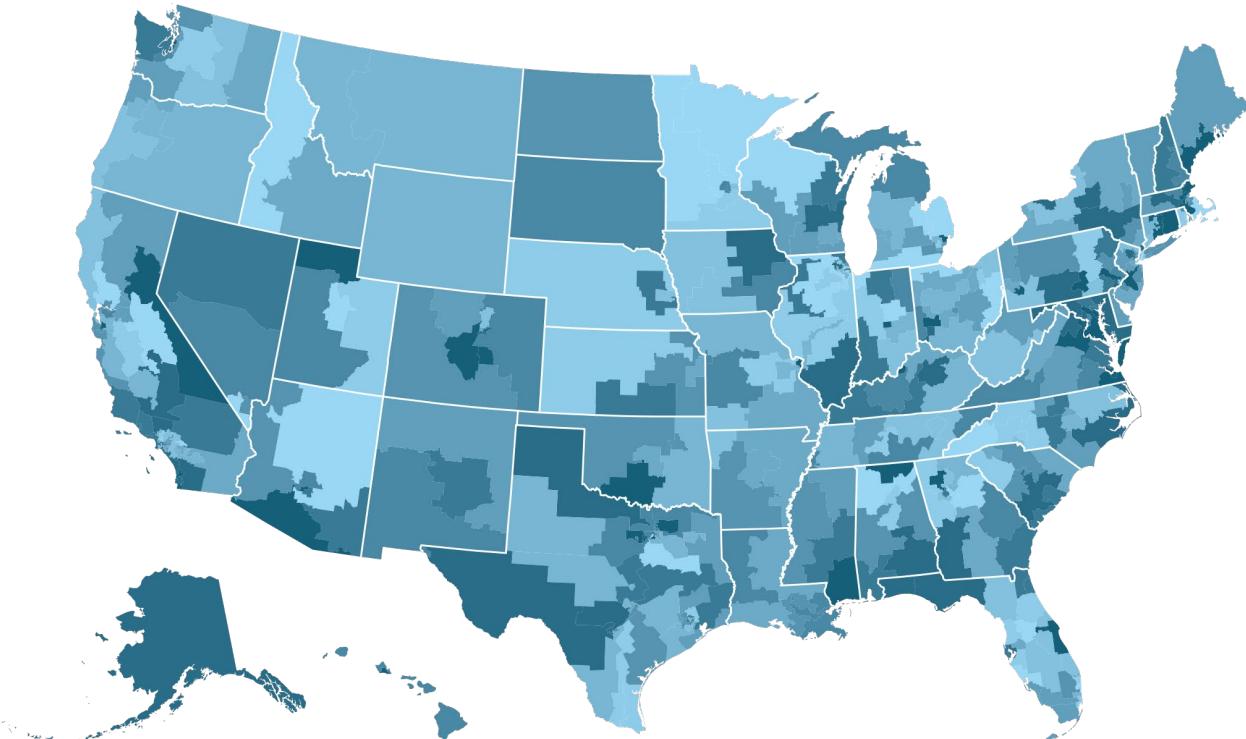


Upcoming Submissions								
Division/Working Group	Rule/Policy	Description	Inputs Due	Final Draft Due	Filing Due	Additional Interested Divisions	Division/WG Lead Contact	S&P Lead Contact
Small Business	SBA, 89 FR 103709	Proposed rule; the U.S. Small Business Administration (SBA) proposes to revise its Small Business Subcontracting Program regulations to encourage faster payments to small business subcontractors and streamline the reporting process for prime contracts	10-Feb	14-Feb	18-Feb		ML Mackey ML.Mackey@beaconinteractive.com	Michael Seeds MSeeds@NDIA.org
International	USTR-2025-0001	RFI; USTR invites comments from the public, on a country-by-country basis, to assist the U.S. Trade Representative in reviewing and identifying any unfair trade practices by other countries, and in initiating all necessary actions to investigate the harm to the United States from any non-reciprocal trade arrangements.	3-Mar	7-Mar	11-Mar		Mark Webber Mark.J.Webber@lmco.com	Anthony Borda ABorda@NDIA.org
S&P	BIS-2024-0055	Interim Final Rule; Implementation of Additional Due Diligence Measures for Advanced Computing Integrated Circuits; Amendments and Clarifications	10-Mar	13-Mar	14-Mar		-	Anthony Borda ABorda@NDIA.org
Cybersecurity	FAR Case 2017-016	Proposed rule; DoD, GSA, and NASA are proposing to amend the Federal Acquisition Regulation (FAR) to implement the National Archives and Records Administration's Controlled Unclassified Information Program enacted under an Executive Order entitled Controlled Unclassified Information.	3-Mar	10-Mar	17-Mar		Trey Hodgkins trey@hodgkinsconsulting.com	Michael Seeds MSeeds@NDIA.org
Procurement	FAR Case 2024-007	Proposed rule; DoD, GSA, and NASA are proposing to amend the Federal Acquisition Regulation (FAR) to clarify protest rights for orders set aside under certain multiple-award contracts.	3-Mar	10-Mar	17-Mar		Jamie Sybert JamieSybert@hka.com	Lorenzo Williams LWilliams@NDIA.org
Small Business	FAR Case 2023-011	Proposed rule; DoD, GSA, and NASA are proposing to amend the Federal Acquisition Regulation (FAR) to issue policy on small business participation on certain multiple-award contracts.	3-Mar	10-Mar	17-Mar		ML Mackey ML.Mackey@beaconinteractive.com	Lorenzo Williams LWilliams@NDIA.org

NDIA Data Visualization



DoD Contract Obligations by Congressional District



Created with Datawrapper

- Data visualization enables delivery of new, actionable, and accessible information
 - Vital Signs
 - Congressional Outreach
 - Support NDIA Chapters and Divisions
 - Support NDIA Departments and Affiliates



The Hon. David Norquist

President & CEO, NDIA



The Hon. David Norquist

President & CEO, NDIA



- China as the pacing challenge driving need for reform
- Longest shutdown in U.S. history
- Headwinds to industry engagement with Department



Hon. David L. Norquist
President & CEO



**Brig Gen Guy Walsh,
USAF (Ret)**
Executive Vice President &
Chief Operating Officer



Jen Stewart
Executive Vice President,
Strategy & Policy



Christine M. Klein, CMP
Senior Vice President,
Meetings, Divisions &
Partnerships



**Vice Admiral Sean S.
Buck, USN (Ret)**
President, NTSA



Dr. Arun Seraphin
Executive Director, ETI



Scott Rekdal
Senior Vice President,
Marketing &
Communications



John K. Muller
Senior Vice President,
Membership & Chapters



**Colonel Audricia D.
McKinney, USA (Ret)**
Executive Director, WID



- Driving sense of urgency on Hill and in Department
 - NDAA SPEED and FORGED Acts
 - Secretary Hegseth's November 7th "The Arsenal of Freedom" speech and related guidance
 - 2026 National Defense Strategy - Homeland vulnerable
- Widespread recognition that Defense Industrial Base not positioned for Great Power Competition



- Longest Shutdown in US History – So what?
- What should we expect?
 - Unexpected costs to programs >> Requests for Equitable Adjustments (REA)
 - Missed testing, ATOs, clearances >> Increased backlog that persists
 - Delay in contract actions >> delay start of new programs
 - Furloughs and delayed payments >> Firms and individuals leave DIB
- Discussion
 - Are you seeing this?
 - Other areas that should show a disruption?



- Need to document the disruption
 - Vital Signs survey
 - Outreach through Chapters and Divisions
- Without examples it is not real (Inflation during last administration)
 - Disruption to firm and/or disruption to government programs
- Educate Department and Hill
 - Set marker for future

Gov.Efficiency@ndia.org



- Travel limitations
- Additional levels of review to speaking at industry conferences
- Shutdown
- Discussion: How has this affected your chapter or division?



- Thank you for your leadership!
- NDIA team working hard to support our membership and our volunteer leaders so lots to discuss today.



Networking Break



Collaborating with Colleges and Universities

Guy Walsh

COO, NDIA

Dr. Reed Skaggs

Chair, S&ET Division

Sean Osmond

Central Florida Chapter

<p><u>Purpose</u></p> <ol style="list-style-type: none">1) Evaluate and improve NDIA's value proposition for academia2) Identify challenges/opportunities to grow its academic membership	<p><u>Working Group Participants</u></p> <p>Laura McAleer, Notre Dame Michelle Atchison, University of Texas at San Antonio Theresa Mayer, Carnegie Mellon U. Michael Mattarock, Carnegie Mellon U. Jamie Jones Miller, Northeastern Larry Schuette, Lockheed Martin Mark Lewis, Purdue University</p>
<p><u>Desired End Result</u></p> <ol style="list-style-type: none">1) Attract more academia to events as attendees and speakers2) Increase number of academic members (both R-1/R-2 universities and smaller institutions)3) Increase academic participation in NDIA division and chapter leadership	<p><u>Goal for Final Brief (April 3rd)</u></p> <ol style="list-style-type: none">1) Discuss key findings and recommendations from Working Group meetings2) Discuss academia's role in current landscape and how NDIA can support government-industry-academia collaboration

Areas for More Engagement

- Identify universities who receive DoD awards versus who are not members → find ways to attract those academic partners
- NDIA can play a larger role in workforce development and talent acquisition, especially for students and early career professionals
- Education and training on how to work with DoD as an academic institution
- Branding activities or joint sponsorships with academic partners can help build relationships in academia and get visibility
- There are opportunities to amplify the message to nonmembers that participating in the NDIA network provides forums for deeper understanding in areas (e.g., biotechnology or quantum) beyond their defense applications

Suggested Engagement Recommendations

- Ensure that technical programming of interest to academic speakers and attendees is placed appropriately on agendas to maximize attendance and participation
- Offer short courses on business development topics focused on an academic audience (virtually or in-person)
 - E.g., intro to DoD funding agencies, how to use the STTR program, partnering with defense contractors...
- Hold career fairs at large NDIA events
- Students from degree-granting institutions should receive free or low-cost admission to NDIA events and webinars (consider counterintelligence concerns)
- Highlight academic members in NDIA webinars
 - Academic Member-driven “Technology 101” sessions, Academic Member of the Month webinar series...
 - Potential sponsorship opportunities

Suggested Engagement Recommendations (cont.)

- The NDIA Membership team should record a webinar for academic institutions (members & nonmembers) and explain NDIA member benefits as well as how to better engage NDIA divisions and chapters as well as other FAQs
 - Two per calendar year
 - Recorded video lives on NDIA's website
- Offer meeting space at NDIA HQ for visiting university faculty/staff/students on DC trips to meet with industry/government officials. Advertise this opportunity using the marketing list (recommended on Administrative Recommendations slide)
- Create a NDIA Mentorship Program for students and early career professionals. Identify industry and/or government individuals from NDIA's membership who are willing to serve as mentors (Who at NDIA would own this?)

Suggested Engagement Recommendations (cont.)

- NDIA should advertise industry member internships to students attending academic member institutions
- NDIA should annually give out an academic member award
- NDIA should find industry members to sponsor individual membership for HBCUs/MSIs
- Create a University Liaison position for appropriate divisions and events. This could be from the event planning group (not NDIA staff member)
 - Function would be to help inform Division leadership about shaping events to attract university speakers and attendees, and to help communicate Division activities to universities

Suggested Administrative Recommendations

- Create an academic marketing list for individuals at degree-granting institutions and send a quarterly/monthly/periodic list of events and opportunities
- Separate FFRDCs and UARCs and non-profit research organizations from degree-granting institutions for the purposes of NDIA membership fees, outreach, and other administrative purposes (this may require a change in NDIA's data management system)
- Create individual academic memberships (similar to government/active-duty memberships)
- Create specific web page for academia
 - Share how faculty, staff, students can join NDIA, how to sign up for division memberships and marketing emails, and provide testimonies



Award Presentations



2025 Division of Excellence Award

Is Presented To

NDIA's Undersea Warfare Division

Chair – Tom Callender

Vice Chair – Laurie Carter



NDIA's Distinguished Service Award

is Presented to

LTC Matthew Dooley, USA (RET)

NDIA Model Chapters

Central Florida

First Coast

Great Lakes

Greater Tampa Bay

Northern Tier

Tennessee Valley

Wright Brothers Regional

NDIA Chapters of Excellence

Iowa-Illinois

Michigan

Rocky Mountain

San Diego

Washington, D.C.



**CHAPTER
CHAMPIONS
CHALLENGE**



NDIA



NDIA Individual Membership Champions

Michigan

Rocky Mountain

San Diego



WID Model Chapters

Greater Ohio Valley Chapter

Greater Tampa Bay Chapter



WID Chapters of Excellence

Greater Boston

Greater Los Angeles

Liberty

Michigan

San Diego



**CHAPTER
CHAMPIONS
CHALLENGE**



NDIA



WID Individual Membership Champions

Greater Hampton Roads

Greater Los Angeles

Greater Tampa Bay

San Diego



**CHAPTER
CHAMPIONS
CHALLENGE**



NDIA



WID Government Membership Champions

Greater Hampton Roads

Greater Tampa Bay

Michigan

Greater Ohio Valley



Networking Lunch



Breakout Sessions

NDIA Division Leaders – Salon III

NDIA Chapter & WID Leaders – Salon II



Networking Break & Closing