



April 28, 2015

To: Tribal Summit Group Members

Subject: 2015 Tribal Summit Group Benchmarking Study

At the March 18, 2015 meeting, the Tribal Summit Group Board unanimously approved a project to survey tribal convenience store operators in order to create our first-ever ***Tribal C-Store Summit Group Benchmarking Study***. This project has been discussed and requested by many members and we are excited to announce its reality in 2015!

By way of background, the National Association of Convenience Stores (NACS) publishes an annual *State of the Industry* report that many TSG members purchase. The intent of the ***Tribal C-Store Summit Group Benchmarking Study*** is not to replace the NACS report, but rather support it. Unlike the NACS report, our survey is intended to benchmark tribal-specific gas station and convenience operations. In addition to store operating metrics, data will be compiled on certain human resource and compensation related topics as well.

The completed study will be available to all member tribes and will be a first-ever benchmarking project as it relates to tribally operated gas station and convenience stores. We are excited to announce that this report will be written by noted economist Jonathan Taylor, who has done a similar project for Washington Indian Gaming Association (WIGA) on multiple occasions. In addition to his role as President of the Taylor Policy Group, Mr. Taylor is also a Research Affiliate at the Harvard Project on American Indian Economic Development.

Confidentiality is of the utmost of importance with this project. Thus, Taylor Policy Group (TPG), under a written contract with the Tribal Summit Group, will be the only party with access to the individual operator data itself. As part of the project, TPG will aggregate and analyze the data and share in a masked form with all Tribal Summit Group members.

On approximately **June 1, 2015** the primary voting member for each tribe will receive a questionnaire by email from the Tribal Summit Group. In order to complete the project in time to share the results at the September Membership Meeting, all surveys will need to be completed and submitted by **June 26, 2015**. Only those tribes that participate in the survey will be guaranteed of receiving a copy of the Study. Any tribe that opts to not contribute data to the project will be required to pay for a copy of the Study, assuming the TSG makes it available to those members that do not participate. Importantly, if not enough tribes contribute data, the project may not be able to be completed. We estimate the need for at least 10 tribes to participate to make the results meaningful.

On behalf of the Tribal Summit Group Board, we hope each of you shares the same level of excitement as we do in regards to this project. Given the number of requests we often receive in regards to this type of study, we hope each of you will choose to participate in our first-ever ***Tribal C-Store Summit Group Benchmarking Study!*** Thank you in advance for your support.

Warm regards,

A handwritten signature in blue ink, appearing to read "Jamey Balousek".

Jamey Balousek  
Chairman – Tribal Summit Group