2021 Goals and Priorities: Addressing Challenges and Building Momentum for SAF Deployment

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Dear Stakeholder,

Thank you for your continued work to advance the industry’s pursuit of sustainable aviation fuels (SAF) as a member of the Commercial Aviation Alternative Fuels Initiative (CAAFI®). 2020 saw unprecedented challenges for the aviation industry due to business downturns associated with the Coronavirus pandemic. Despite this, we have also seen continuing advances for development and broadened use of SAF. This is partially driven by the fact that while airlines are clearly focused on near-term financial viability, they are also simultaneously mindful of long-term viability and the fact that SAF is an integral part of the aviation industry’s commitments. So, the industry continues its engagement, and the work on SAF progresses. To a degree, we expect 2021 to be somewhat of a banner year, with many activities moving toward announcement as well as completion and production.

During 2020, members of the CAAFI leadership team participated in more than 60 workshops, seminars, and project discussions, both domestically and internationally. This demonstrates growing interest from many constituencies and reflects an expansion of our efforts to achieve awareness and foster additional collaboration. A quick review of 2020 events illustrates multiple advancements. ASTM D7566 was expanded with two additional production pathways for SAF production (Annexes A6 and A7), while at year-end we see six additional fuel qualification evaluations in progress. Business and commercial aviation operators, suppliers, and manufacturers highlighted their support for SAF with demonstration flights, fuel off-takes, and additional airport deliveries. ICAO finalized all details needed to enable the first phase of CORSIA to commence in 2021. CAAFI continued to engage with companies interested in opportunities for additional technologies and approaches for SAF supply. You can read more about 2020 highlights and CAAFI activities in the appended pages.

At the end of each year, the CAAFI Leadership team prioritizes CAAFI activities for the coming year. We base this on feedback from the CAAFI Steering Group and membership, informal feedback from industry and partners, and on our own observations about challenges and needs in the marketplace. Based on this input, CAAFI leadership will continue to work in four major areas in 2021, focusing on concepts in each area of activity listed below.

**CAAFI 2021 Priorities**

1. **Communicate the Value Proposition of SAF** — communicate economic, social, and environmental benefits of SAF to federal, state and local governments, regional bodies, non-governmental organizations, the private sector and the public to broaden the base of stakeholders supporting SAF.
   - Engage with the new Administration and Congress on progress and remaining challenges.
   - Expand outreach via various communications releases, interviews, and social media.
   - Participate in outreach activities including conferences, seminars, and virtual events.
   - Support the publication and dissemination of critical SAF research.
   - Track and communicate the progress of SAF commercialization activity.
2. **Enhance the Fuel Qualification Approach** – promote a broadly supported, streamlined certification/qualification program and a more durable, higher capacity process to accelerate the addition of new fuels to the ASTM International specification.
   - **Expand and facilitate new producer** use of Tier Alpha and Beta prescreening.
   - **Advise potential SAF producers** on navigating the fuel qualification process, which includes the ASTM D4054 Clearinghouse and D4054 Fast Track approach.
   - **Continue to coordinate international qualification activities** to share costs and accelerate approvals.
   - **Evaluate learnings from the National Jet Fuel Combustion Program (NJFCP)** for additional improvement to the fuel qualification process.
   - **Accelerate efforts to advance past the current 50% maximum blending limitations.**

3. **Align Efforts to Enable Commercial Deployment of U.S. SAF Supply** – focus on SAF implementation by supporting feedstock and fuel development, fostering producer-buyer engagement leading to offtake agreements, and building on federal, state and regional supply chain efforts.
   - **Leverage the capabilities** of the FAA’s Aviation Sustainability CENTer (ASCENT) and Continuous Lower Energy Emissions and Noise (CLEEN) programs.
   - **Partner with federal agencies** through coordination with the Sustainable Aviation Fuels Interagency Working Group (SAF IWG) under the Biomass Research and Development Board and similar multi-agency efforts to advance activities for SAF development and deployment.
   - **Engage with regional, state, and local supply development efforts** with public, academic, private and airport stakeholders, including the addressing of all challenges associated with current or envisioned supply chains.
   - **Work with business aviation** to partner with corporations with ambitious corporate social responsibility goals for fuel supply development and offtake agreements.
   - **Support efforts to create Book and Claim and other innovative fuel acquisition processes** to enable optimized commercialization (minimizing both costs and carbon indices) of SAF production and delivery.

4. **Implement Frameworks & Share Best Practices** – provide tools, share best practices and integrate information to support communication and understanding among diverse stakeholders on the readiness of feedstocks and fuels, their potential economic, social and environmental benefits and impacts, and their feasibility with regard to supply chains, technology and economics.
   - **Expand the use and topical content of CAAFI Webinars.**
   - **Expand the library of Feedstock Readiness Level (FSRL) Evaluations** available on USDA’s National Agricultural Library.
   - **Implement a Commercial Readiness Level Framework** to support fuel producer self-assessment and customer understanding of commercialization progress.
   - **Develop, support and use publicly available tools, data and analyses** to support supply chain development and highlight economic benefits and job impacts, including:
     - Volpe Freight & Fuel Transportation Optimization Tool (FTOT)
     - Techno-economic Analysis (TEA)
     - University of Tennessee CAAFI Southeast (UTCASE) Initiative
   - **Facilitate international cooperation** on SAF development, evaluation and deployment.

As always, please reach out to me, other members of the Administrative Leadership Team, or any CAAFI Team Lead if you have any feedback, would like to be more involved in the initiative, or have recommendations on new types of engagement you would like us to consider. We remain open to
adjusting our priorities as needs arise. As you may have seen in a CAAFI update in early December, we will postpone the next in-person Biennial General Meeting to June of 2022. In place of our original June 2021 dates, we will hold a virtual mini-forum, with more details to follow.

On behalf of the CAAFI Leadership Team, the CAAFI Steering Group, and all our constituents, thank you for your contributions to the industry’s collective effort to commercialize SAF! I am looking forward to sharing another great year with you in 2021!

Sincerely,

Steve Csonka
CAAFI Executive Director
SAF Highlights in 2020

In 2020, industry and CAAFI stakeholders continued to make significant progress on SAF. We have put together a representative (not exhaustive) list below, and further detail on these and other highlights of interest can be found on CAAFI.org:

- **Fuel Screening and Testing** – 43 novel SAF samples from 7 producers have been evaluated under Tier $\alpha$, Tier $\beta$ or both evaluation methods in 2020.
  - A recent archival publication has been accepted for publication documenting the evaluation process and methods.
  - Outreach and collaborations have been extended to more than 6 additional novel producers and research groups.
  - The evaluation methods for Tier $\beta$ have reduced costs and volumes needed for evaluation from $\sim 500 \text{ mL}$ to $150 \text{ mL}$.
  - Novel experimental approaches are in development to evaluate additional properties with less sample and greater accuracy.
  - **Rolls-Royce has plans** to use 100% SAF for the first time in testing next generation engine technology. This test is part of the company’s de-carbonization strategy. The SAF was produced by World Energy in California, sourced by Shell, and delivered by SkyNRG. This test by Rolls-Royce will demonstrate that its current engines can operate with 100% SAF as a full “drop-in” option.

- **ASTM Fuel Pathway Qualification** – Industry, government and researchers continued to jointly advance fuel qualification including one new fuel approval, a pipeline of fuel candidates under evaluation, coordination of testing through the D4054 Clearinghouse, and improvements to the process with a new Fast Track provision:
  - The aviation industry completed the evaluation and approval of SAF production via ARA’s Catalytic Hydrothermalysis Jet (CHJ) pathway (published in January 2020 as ASTM D7566 Annex A6).
  - The aviation industry completed the evaluation and approval of SAF production via IHI’s proposed Hydrocarbon-Hydroprocessed Esters and Fatty Acids (HC-HEFA) fuel utilizing the newly approved D4054 Fast Track Annex with final qualification completed on May 1, 2020 and publication later that same month.
  - Completed ASTM balloting and qualification of the revision to D1655 Annex A1 to accommodate the Fischer-Tropsch (FT) Co-processing pathway.
  - Completed D4054 Tiers 1-2 and initial NJFCP testing of Shell Integrated Hydroprocessing Hydroprocessed (IH$^3$) Fuel through D4054 Clearinghouse at the University of Dayton Research Institute (UDRI) funded under ASCENT for Phase 1 ASTM Research Report (submission to OEMs expected in early 2020).
  - Re-initiated OEM evaluation of Swedish Biofuels Alcohol to Jet-Synthetic Kerosene with Aromatics (ATJ-SKA) draft Phase 1 ASTM Research Report.
  - Took initial steps to engage both Vertimass and Global BioEnergies in ASTM D4054 evaluation and review process.
  - Currently engaging with CSIR on a modification to the HEFA pathway that also produces cyclopentaffin and aromatic content.

**Fuel Development, Production and Use**
• Neste made many announcements related to SAF commercial development. Neste introduced SAF to San Francisco International Airport (SFO) using the existing pipeline infrastructure. SAF has been delivered to the airport before via trucks, but this is the first time the fuel was delivered via pipeline where it will be used by major airlines that are committed to reducing carbon emissions, including Alaska, American, and JetBlue. This demonstrates SAF can be delivered in a multi-product pipeline at a major airport, making it possible to become the future standard. Neste also initiated supply to two airports in Tokyo in collaboration with ANA. Neste completed the acquisition of Count Terminal Rotterdam, which is used to store, refine, and blend renewable waste and residue-based materials in the Rotterdam area.

• Altalto Immingham, which will be the UK’s first commercial waste-to-jet-fuel plant, has been granted planning permission from North-East Lincolnshire Council’s Planning Committee. The project to build the plant will be a partnership between Velocys, British Airways, and Shell. The plant will convert hundreds of thousands of tonnes per year of non-recyclable household and commercial waste into SAF. The technology for the fuel will be provided by Velocys, and the expected greenhouse savings will be around 70% for each tonne of conventional jet fuel it replaces.

• There were several announcements made concerning the increased U.S. domestic production of renewable diesel fuel, adding to the already significant number of announced plans. Activities of which CAAFI is aware include 24 projects with a production capacity exceeding 6 billion gallons per year. These activities are likely to advance the development of feedstocks from wastes and dedicated crops, supply chains and SAF capacity.

• World Fuel Services, World Energy and Jet Aviation made sustainable aviation fuel (SAF) available for business jets traveling to Davos from three airports for the 50th Annual Meeting of the World Economic Forum (WEF). The flights originated in Jet Aviation’s facilities in Teterboro (TEB), Boston/Bedford (BED) and Dulles International (IAD). Although SAF was not physically available at those facilities, if consumers at those locations chose to participate in the program, for every gallon of conventional fuel purchased an equivalent amount of SAF would be used on flights departing Jet Aviation’s Van Nuys (VNY) location (enabling a Book & Claim approach to fuel acquisition).

• Shell Aviation and World Energy have announced that they have initiated the supply of sustainable aviation fuel (SAF) to the Lufthansa Group at San Francisco International Airport (SFO). The Lufthansa Group plans to use the SAF on three intercontinental flight routes from SFO to Frankfurt, Munich and Zurich. The announcement is part of a long-term collaboration between Shell Aviation and World Energy to develop a scalable supply of SAF.

Partnerships/Collaborations

• Microsoft, SkyNRG and Alaska Airlines announced a unique partnership to purchase sustainable aviation fuel (SAF). Microsoft will purchase SAF credits from SkyNRG to make up the difference in cost between conventional jet and SAF. SkyNRG will then supply SAF to the airport fueling system used by Alaska Airlines, targeting the fuel consumption associated with Microsoft employee travel on some of their most travelled routes, namely between Seattle and Los Angeles, San Francisco, and San Jose. This latest effort by Microsoft to reduce its carbon impact is in line with their sustainability goals, which include being carbon negative by 2030. Specific details, including the quantity of SAF that will be purchased, were not released.

• Shell signed an offtake agreement with Red Rock Biofuels to buy sustainable aviation fuel (SAF) from their Lakeview, Oregon plant scheduled to begin commercial production in the first half of 2021. The new biorefinery is expected to produce more than 6 million gallons SAF and
renewable biodiesel a year from woody biomass using the Fischer-Tropsch conversion process. Shell will distribute the SAF to Red Rock’s existing customers, FedEx and Southwest Airlines, through existing airport infrastructure. This collaboration demonstrates how SAF producers can leverage existing supply chains and industry expertise to increase SAF availability in the market.

- **Air Transat and the SAF + Consortium signed the first sustainable aviation fuel (SAF) offtake agreement in Canada.** It is the first time a Canadian commercial airline has made an agreement to work with a clean fuel developer. Air Transat made this agreement to help reach their targeted reduction of greenhouse gas emissions. SAF+ Consortium is finishing the construction of a pilot plant in Montreal East that will make jet fuel from carbon dioxide utilizing the Fischer-Tropsch (FT) process. The company estimates its jet fuel will have an 80% lower carbon footprint than conventional jet fuel. Air Transat had its first two delivery flights powered with SAF produced by Neste and supplied by AirBP in July. Airbus delivered the aircraft from Hamburg, Germany to Montreal. Hamburg is now Airbus’ third site that enables SAF usage for delivery flights, joining Toulouse, France and Mobile, Alabama.

- **Aerion, a supersonic aircraft company, and Carbon Engineering partnered** to develop solutions for carbon neutral supersonic air travel. Carbon Engineering already has a synthetic fuel made from carbon dioxide (CO2) that is captured from the atmosphere, water and clean energy. The companies have signed a Memorandum of Understanding to find a way for the fuel Carbon Engineering makes to power Aerion’s AS2 supersonic business jet, a carbon neutral supersonic commercial aircraft. The agreement shows an encouraging step forward for both companies in achieving their common goal of building clean energy transportation networks.

- **Amazon Air announced** a new commitment to buy up to 6 million gallons of sustainable aviation fuel (SAF). The fuel will be added to Amazon’s existing fuel supply at select locations. After two trial flights with SAF earlier this year, Amazon Air reached out to Shell to secure the SAF supply produced by World Energy. Amazon Air made the move to help reduce carbon emissions from its growing cargo operations, as well as assist in building confidence in the SAF industry. This is the latest successful collaborative effort by World Energy and Shell to help businesses decarbonize with SAF solutions.

- A Japanese consortium consisting of Japan Airlines, Marubeni, JXTG Nippon Oil and Energy and JGC Japan agreed to jointly conduct a feasibility study on supply chains using waste materials (industrial and municipal waste) to produce sustainable aviation fuel (SAF) in Japan using Fulcrum Bioenergy’s gasification and Fischer-Tropsch approach. The study will include the evaluation of plastic waste as a feedstock. The study will assess waste collection and processing options, the conversion process, logistics of end-products, and the carbon emissions impacts.

- **LanzaTech launched a spin-off company** to produce sustainable aviation fuel (SAF). The new company, LanzaJet, will be supported by investors such as the Suncor Energy Company, an integrated energy company from Canada, and Mitsui & Co, a Japanese trading and investment company. LanzaJet will use the funding to complete the construction of the Freedom Pines biorefinery in Soperton, GA. The facility is expected to produce 10 million gallons of SAF and renewable diesel per year starting in 2022.

- **Delta Air Lines agreed** to purchase 10 million gallons of sustainable aviation fuel (SAF) that will be produced from Gevo’s existing SAF production facility in Luverne, MN. The two companies agreed that the fuel will be sold at a fixed price (to be determined at the time of delivery) for the first seven years. The fuel is expected to be available starting between 2022 and 2023. This offtake agreement with Gevo follows Delta’s $2 million investment for a SAF facility feasibility study in Washington State.
• **Boom Supersonic**, an aerospace company with the goal of building history’s fastest supersonic airliner, announced its XB-1 test program would be fully carbon-neutral with the use of SAF and carbon offsetting. With the XB-1 program, Boom is integrating environmental considerations throughout the aircraft’s design, testing and operation. Boom has partnered with Prometheus Fuels to supply SAF during the remainder of the XB-1 test program. Prometheus’ technology removes carbon dioxide from the air and uses electricity produced from solar and wind sources to turn it into jet fuel.

**Funding Announcements**

• The **United States Department of Agriculture (USDA)** announced another Request for Applications (RFA) for their Sustainable Agricultural Systems (SAS) funding. The amount available in the program is $150 million, for awards up to approximately $10 million each. For FY 2021, applications must focus on system approaches that promote transformational changes in the U.S. food and agricultural system within the context of the long-term goal of increasing American agricultural production by 40%.

• The **U.S. Department of Energy (DOE)** announced a $68 million funding commitment for research aimed at making bioenergy feedstocks more productive and resilient. The funding will be distributed over five years to the chosen projects. The research is intended to enhance understanding of the molecular mechanisms that allow the feedstock crops to be productive and survive in stressful environments. Of the projects chosen to receive the funding, several are especially relevant to SAF. One focused on pennycress (*Thlaspi arvense*) as a winter oilseed bioenergy crop in the U.S. Midwest and other temperate regions including the Pacific Northwest. Another focused on enhancing camelina (*Camelina sativa*) oilseed production with minimum nitrogen fertilization.

• The Air Force Research Laboratory (AFRL) and the Wright Brothers Institute partnered to sponsor the second of three $1 million **Air Force Challenges**. AFRL has been researching the viability of improving performance in composite materials using synthetic biology, and this challenge is intended to identify the best approaches for biosynthesizing a high-energy endothermic fuel.

• The **Queensland Waste to Biofutures Fund** granted funding to two SAF projects. The Queensland Waste to Biofutures Fund is an initiative to grow and enhance the bioeconomy in Queensland by increasing the capacity to produce bioenergy, biofuels, and bioproducts.
  - Gevo, Inc. was awarded more than $100,000 USD to evaluate sugarcane and wood waste resources in Queensland for their alcohol-to-jet-fuel conversion process. Gevo supplied the alternative jet fuel used in Virgin Australia’s SAF delivery trial at Brisbane Airport.
  - Licella Holdings also received approximately $325,000 USD to conduct a feasibility study for a biorefinery that converts sugarcane waste into biofuel using Licella’s Catalytic Hydrothermal Reactor (Cat-HTR) technology. Licella is partnering with University of Queensland and Burdekin Renewable Fuels and others. This technology uses supercritical and near-supercritical water to convert a wide variety of low-cost, waste feedstocks and residues into high-value products. Queensland is looking to provide a processing option to address the 1.65 million tonnes of sugarcane bagasse produced in the region every year.

• The **U.S. Department of Energy (DOE)** announced an investment of nearly $100 million in funding for research and development of bioenergy technologies. Issued on behalf of DOE’s **Bioenergy Technology Office**, topic areas within the FY20 Bioenergy Technologies Multi-
Topic Funding Opportunity Announcement support the U.S. bioeconomy by reducing the price of drop-in biofuels, lowering the cost of biopower, and enabling high-value products from biomass or waste resources.

- **The U.S. Department of Energy announced up to $64 million** in funding to advance hydrogen innovations that will build new markets for the H2@Scale initiative. This investment will support transformational R&D, market expansion, and production, storage, transport, and use.

Other Announcements/Activities

- CAAFI joined the Business Aviation Coalition for Sustainable Aviation Fuels, and the coalition released the second edition of Sustainable Aviation Fuel Guide, *Fueling the Future*. Although it is targeted primarily at the business aviation community, the Guide, as well as the Coalition’s website, serves as a great up-to-date resource for anyone focused on SAF. The business aviation community also held its first Sustainability Summit. The event gathered operators, legislators, regulators, fuel suppliers and others to discuss how best and how quickly the production, supply, demand and use of SAF can be accelerated.

- The French government announced their ambition to replace 50% of traditional jet fuel with SAF by 2050. The announcement came out of an 18-month collaboration between the French government and industry to define French SAF goals. This was the first public-private aviation initiative in France and laid out recommendations for standing up the SAF industry in France. Alongside the government’s ambitions, industrial entities announced the launch of a new Call for Expression of Interest (CEI) to provide support and incentives for investments in SAF production facilities in France.

- At the beginning of the year, JetBlue was the first U.S. airline to pledge to be carbon neutral. In August, they reported they achieved carbon neutrality for all domestic flying. This was done through offsets and the use of SAF on its flights from SFO.

- Etihad Airways joins other airlines in committing to target zero net carbon emissions by 2050. The United Arab Emirates’ national airline plans to achieve its goal by optimizing fuel management, utilizing SAF, and purchasing carbon offsets. The airline has committed to the support of SAF made from Abu Dhabi’s municipal waste and saltwater-tolerant plants. In addition, Etihad had a new Boeing 787 ‘Greenliner’ delivered to Abu Dhabi from Charleston, South Carolina using a 30 percent SAF blend produced by World Energy.

- United Airlines pledged to be carbon neutral by 2050. United plans to invest in Direct Air Capture technology to build a plant that will permanently sequester one million tons of CO₂ each year and use SAF to achieve carbon neutrality rather by purchasing offsets.

- The U.S. Department of Energy’s Office of Energy Efficiency and Renewable Energy’s Bioenergy Technologies Office (BETO) hosted five workshops relevant for the development and deployment of SAF. The November 2020 workshop on Hydrothermal Liquefaction in particular focused on SAF, and several other contributed to the development and deployment of advanced alternative fuels and the bioeconomy, including SAF.

CAAFI Activities in 2020

In 2020, the leadership of the CAAFI R&D Team was modified to address personnel changes at Boeing, with Dr. Joseph Ellsworth replacing Dr. Michael Lakeman. Rich Altman continues to move in the direction of retirement, giving up direct participation in the CAAFI Administrative Leadership Team; however, Rich will continue to collaborate with various CAAFI constituents and SAF project activities, but as an independent contractor at modest involvement levels.
CAAFI Tools and Resources continued to be developed and applied by the community. This included the release of Sustainable Aviation Fuel Prescreening Tools and Procedures. In addition, the Volpe Center continued to release quarterly updates to the public version of the Freight and Fuel Transportation Optimization Tool (FTOT) with FAA support.

CAAFI continues engagement with three USDA NIFA AFRI Coordinated Agriculture Projects (CAP), including the Southeast Partnership for Advanced Renewables from Carinata (SPARC), working on the commercialization of the oilseed carinata, Sustainable Bioeconomy for Arid Regions (SBAR), working on the commercialization of guayule and guar, and Integrated Pennycress Research Enabling Farm & Energy Resilience (IPREFER), working on the commercialization of pennycress. CAAFI’s Executive Director Emeritus, Rich Altman, continued to lead CAAFI’s State and Regional Initiatives on the East Coast in Connecticut, Georgia and Florida. Chris Tindal is fostering activities in the Carolinas and with the University of Tennessee and CAAFI collaboration for activities in the Southeast (UTCASE). Activities in other states and regions also continued.

Five CAAFI Webinars introduced CAAFI stakeholders to key activities and provided a forum for information sharing and member learning:

- **Moving Toward Qualification: Two New SAF Candidates** by Eva van Mastbergen (SkyNRG) and Griffin Valentich (Shell)
- **ICAO CORSIA and Alternative Jet Fuels** by Dr. James Hileman (FAA)
- **European Policies: Opportunities and Challenges for Sustainable Aviation Fuels** by Valentina Vecchio (Boeing)
- **The State of Sustainable Aviation Fuel** by Steve Csonka (CAAFI)
- **More Than Biomass: Purposefully Grown for Ecosystem Services** by Cristina Negri (Argonne National Lab)

CAAFI assisted Biofuels Digest in planning and executing SAF Panels during the Advanced Bioeconomy Leadership Conference (ABLC) in Washington, DC. This conference provides a platform for bioindustry professionals worldwide to come together to learn about the latest progress and insights into the bioeconomy.

CAAFI assisted the Biotechnology Innovation Organization (BIO) in coordinating an SAF Panel during the BIO IMPACT Agricultural and Environment Conference (formerly World Congress) held virtually on September 21-22, 2020.

CAAFI worked with DOE and PNNL to support the virtual HTL workshop in November. CAAFI is hopeful that this technology, which is of particular interest for the conversion of wet waste feedstocks and specific purpose-grown feedstocks, might soon see commercialization and expansion.

CAAFI started a blog, The SAF Carafe, in conjunction with celebrating National Aviation Day on August 19th. The goal of the blog is to show the personal side of aviation professionals who are working SAF, while providing information that is practical and of interest. Going forward, the CAAFI team plans to publish more blog posts.
2021 Events of Interest

The CAAFI Team Leads will be supporting the following events of interest in 2021. Please consider joining us!

- ABLC 2021, March 17-19, Washington, DC and Virtual
- CAAFI Virtual Forum, June 2-4, Virtual
- BIO International Convention, June 10-11 & 14-17, Virtual
- IATA Global Sustainable Aviation Forum, & IATA Sustainable Aviation Fuel Symposium (tbc)
- ABLC Next, October (tbc), San Francisco, CA
- GARDN Presents SAF Talk, Q4 (tbc)

Stay tuned for more information on these and additional events through www.caafi.org and the CAAFI Quarterly newsletters.