



2020 ANNUAL REPORT

What began as a year of challenge, ended with the PNDC community coming together like never before, forging new ways of doing business and supporting one another.

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PIVOTING IN TIMES OF CHANGE

PNDC showed the strength of community in times of crisis - true to our mission of providing intelligence, access, and support.

As we look back on this unprecedented year of ups and tragic downs, we recognize all that we have lost. However, despite this year's challenges, our PNDC family grew stronger than ever as we looked for opportunities to support our members' business growth, our region's economy, and our nation's security.

We began 2020 with some great momentum – hosting several engaging networking events hosted by Opus Interactive, we toured Out of the Box Manufacturing and held the first Pints & Professionals Happy Hour hosted by dedicated volunteers on the PNDC Membership and Marketing Committee. In February, we held a Supply Chain Opportunities Conference where attendees learned about opportunities to sell to NASA Jet Propulsion Lab, Vigor, Leupold & Stevens, and the Army Corp of Engineers.

As we all know, in March of 2020, everything changed. Our hearts went out to all those impacted by COVID-19, those that were sick or supporting ailing family members. As we learned of those on the front-lines that needed equipment and support – PNDC members were quick to assist, making masks, face shields, engineering ventilators and finding innovative solutions to respond to the global crisis. Many more knew that their job was to keep their doors open, with the Defense Production Act spurring production of necessary items for COVID response as well as to support the Defense Industrial Base.

As 2020 continued, PNDC - like many of our member businesses, knew that we must pivot what we do and how we do it. Associations like PNDC show the strength of our community in times of crisis – so we were quick to check in with members and see how we can help.



OUR 2020 FOCUSES INCLUDED:

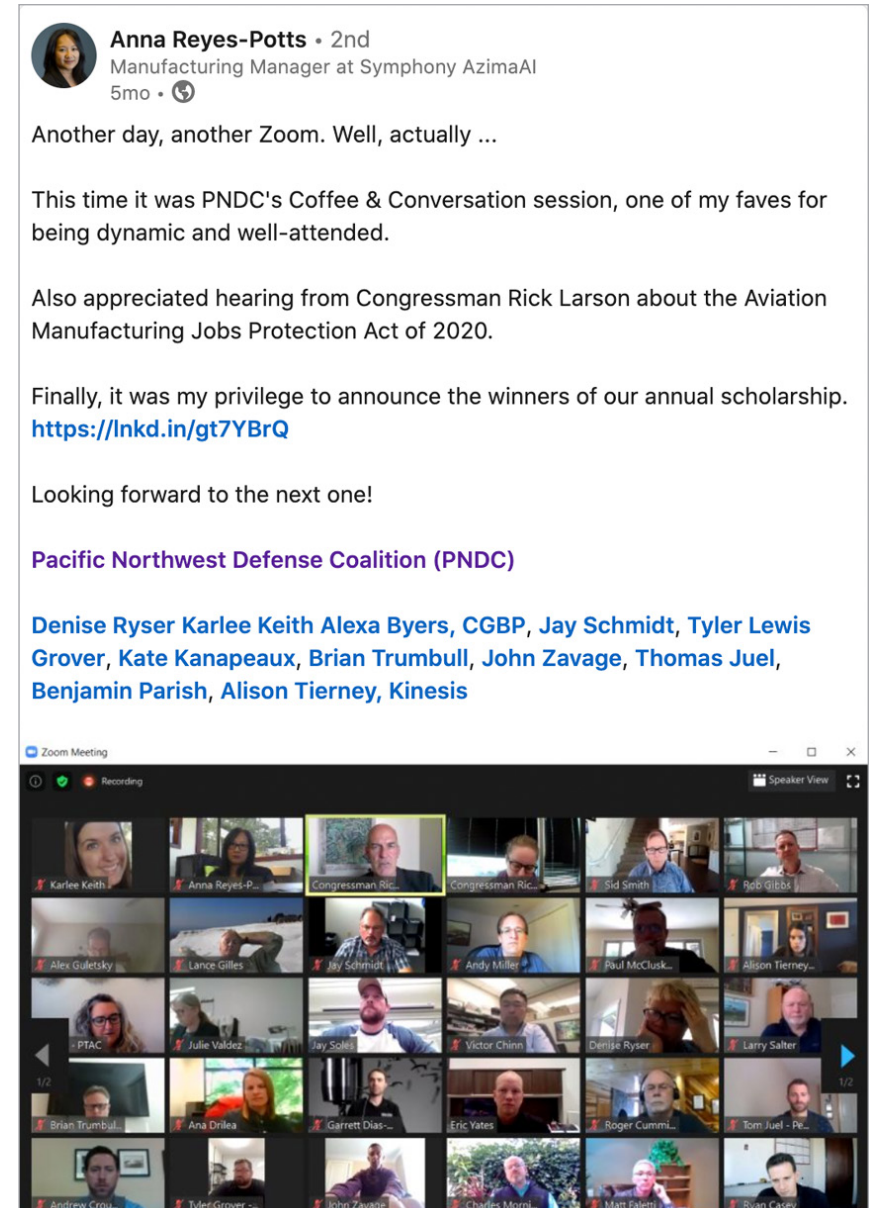
- › Offering support and connections to find new suppliers when overseas shipments were interrupted.
- › Found jobs for engineers that were about to be laid off due to economic downturns in the aerospace market.
- › Introduced buyers to sellers within the community.
- › Helped our members navigate the procurement processes with new leads with large prime contractors and government agencies.
- › Arranged meetings with elected officials to help them understand what support would best shore up our small businesses.

“THE MESSAGE WAS SIMPLE – NEED HELP? CALL PNDC STAFF AND WE WILL SEE WHAT WE CAN DO TO ENGAGE THE COMMUNITY TO SUPPORT YOU.”

DENISE RYSER, DIRECTOR - MARKET DEVELOPMENT, PNDC

“THE PACIFIC NORTHWEST DEFENSE COALITION HAS BEEN A STRONG ADVOCATE FOR THE DEFENSE COMMUNITY AND SUPPLY CHAIN IN OUR REGION. WE AT BOEING GREATLY APPRECIATE PNDC FOR THEIR PARTNERSHIP.”

BILL MCSHERRY, VICE PRESIDENT, GOVERNMENT OPERATIONS, BOEING COMMERCIAL AIRPLANES - THE BOEING COMPANY



WE ALSO LOOKED FOR OPPORTUNITIES TO FURTHER ONLINE CONNECTIONS THAT COULD GO BEYOND WHAT WE HAD TRADITIONALLY DONE IN-PERSON.

- › We got out in front of new Cybersecurity Requirements with online educational programs. These were planned in-person for small groups, yet with the new online format, we were able to educate 200 regional businesses on the Dept. of Defense's evolving cybersecurity requirements.
- › We looked to build connections with procurement professionals from all branches of the U.S. Military, allied Governments, Department of Homeland Security, and large prime contractors.
- › We held the first annual PNDC Military Pitch Day where 14 member companies got to give their pitch to a very distinguished group of military tech scouts.
- › We focused on those in the defense supply chain - connecting members directly with buyers from Insitu, Vigor, Boeing, NASA JPL, Airbus, Leupold & Stevens, Electroimpact and SAFE Boats.
- › ... and of course, we continued to network and build a community to help and support all our businesses with our Coffee & Conversations program and our new Pints & Professionals Virtual Scavenger Hunt.
- › Hosting our annual program devoted to doing business with Department of Homeland Security (DHS) online, we connected the PNDC community to senior level procurement and program officers from the DHS Office of the Chief Procurement Officer, Coast Guard, DHS Office of Small and Disadvantaged Business Utilization, Customs and Border Protection, FEMA, and the Science & Technology Directorate.
- › We hosted specific programs that brought members market intelligence and opportunities in aerospace and maritime.

IN 2020 PNDC HOSTED 50 EVENTS (A FEW IN-PERSON AND A LOT VIRTUALLY) WITH OVER 2000 ATTENDEES!

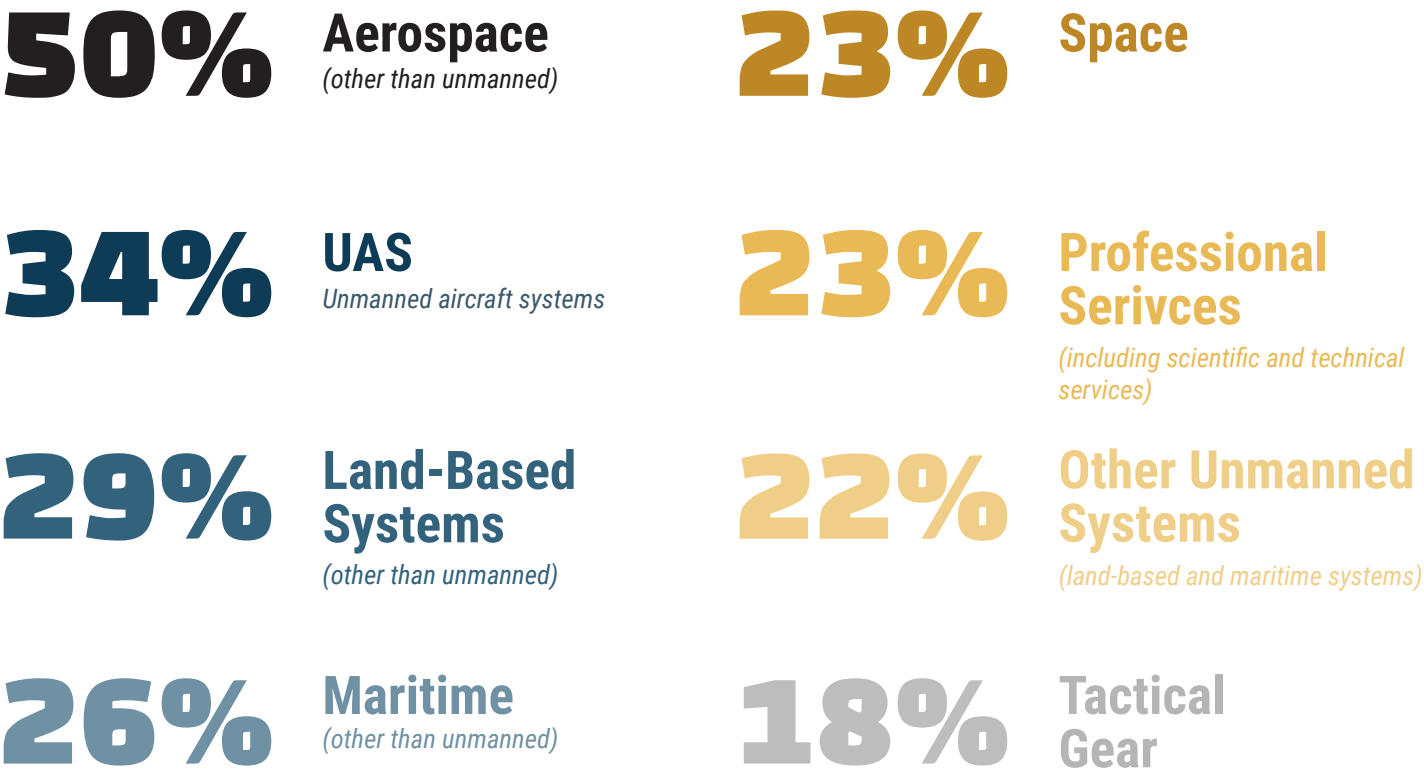
And we are just beginning. Look for the Leading Ladies of Defense Event next year, an expanded Aerospace Defense Conference including a partnership with NASA procurement, and a PNDC member pavilion at DSEI in London 2021!



The following is data captured from the 2020 PNDC member survey, which captured the opinions, thoughts and needs of 89% of our members.

PNDC MEMBERS BY INDUSTRY:

When asked which industry best represents where your organization's products and services are used (end-use)?

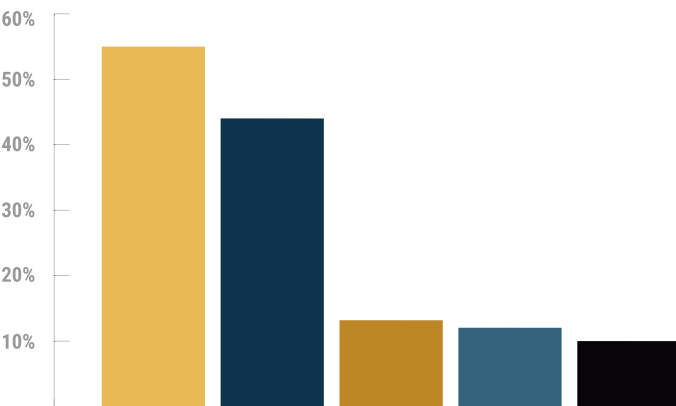


"I SINCERELY APPRECIATE PNDC'S LEADERSHIP AND FACILITATION OF THESE GREAT CONNECTIONS FOR FLIR AND OUR FELLOW INDUSTRY MEMBERS. "

TROY BOONSTRA,
VP, PRODUCT MANAGEMENT, FLIR SYSTEMS, INC.
SENSORS LINE OF BUSINESS

WHO’S INVOLVED WITH PNDC:

When asked what is your responsibility within the organization?



- 55% Leadership
C-Level, owner, director
- 44% Business development
Sales, Marketing, outreach, etc.
- 13% Client support
contracting support, consumer service
- 12% Engineering, research & development
- 10% Manufacturing activities

HOW CAN PNDC HELP:

- 85% Networking
to build connections, community, and peer support
- 68% intelligence, business development opportunities, and connections with U.S. defense and security government sales and funding
- 66% Intelligence and connections with large prime/ tier one defense companies

GOVERNMENT CONTRACTORS:

When asked which of these types of governments are you typically selling to, either directly or within the supply chain?



- 76% U.S. federal agencies
- 29% Foreign governments
- 27% State agencies
- 21% Local agencies

- 61% Intelligence and connections with Pacific Northwest manufacturers.
- 59% Training
and education on government contracting & compliance topics
- 46% Advocacy
with elected officials to track policies and legislation that bolsters the Pacific Northwest’s defense and security industry businesses































2021 EVENT OVERVIEW

As of December 2020
This is intended as an example overview - subject to change without notice.

| AREAS COVERED | DATE | EVENT |
|---|-----------|--|
| Insights & Business Development | January | Pivot to Defense |
| Compliance Training | January | Cybersecurity for Defense Contractors |
| Networking | January | Coffee & Conversation |
| Compliance Training | February | DFAR Update Webinar |
| Insights & Business Development | February | Supply Chain Opportunities Conference |
| Insights & Networking | March | Leading Ladies of Defense |
| Networking | March | Coffee & Conversation |
| Business Development | April | Homeland Security: Meet the Buyers and Innovation Summit |
| Networking | April | Coffee & Conversation |
| Business Development | April | DSEI London 2020 – Exhibit Hub Information |
| Insights & Business Development | May | Supply Chain Opportunities Conference |
| Insights & Business Development | June | NW Aerospace Defense Conference, in partnership with NASA |
| Networking | June | Coffee & Conversation |
| Business Development | July | Northwest Military Innovation Outreach & Pitch Day |
| Networking | August | Summer Networking Events |
| Insights & Business Development | September | Supply Chain Opportunities Conference |
| Business Development | September | Member Booth Pavilion at DSEI London 2021 |
| Insights & Business Development | September | Maritime Defense Conference |
| Compliance Training | October | EAR & ITAR Compliance Conference |
| Business Development | October | Shared Booth at Assoc. of U.S. Army (AUSA) Annual Conference & Tradeshow |
| Insights & Business Development | October | Supply Chain Opportunities Conference |
| Insights & Networking | November | PNDC’s 16th Annual Dinner |
| Advocacy | Various | Congressional Roundtable with Elected Officials |
| Business Development, Trainings, and Insights | Various | Briefings and Training |
| Networking | Various | Networking Events |

PNDC SUSTAINING MEMBERS

PNDC's Sustaining Members provide support, expertise, and leadership to the community - offering key support services to PNDC Member Businesses. Please reach out to PNDC staff for an introduction to these organizations that understand our industry and are focused on helping member businesses thrive!

| | | | | | |
|---|---|---|--|--|--|
| ★★★★ | | | | | |
| <div>Buchalter ATERWYNNE</div> | | <div> BID DESIGNS[®] ALWAYS READY</div> | | | |
| LAW FIRM | | GOVERNMENT CONTRACT/ PROPOSAL SUPPORT | | | |
| ★★★★ | | | | | |
| <div> ACUMEN EXECUTIVE SEARCH</div> | <div> CLOUTIER ARNOLD JACOBOWITZ</div> | <div> CUSHMAN & WAKEFIELD</div> | <div> DORSEY[™] always ahead</div> | <div> EMPLOYMENT PROFESSIONALS[™] Respecting People. Impacting Business.[™]</div> | |
| EXECUTIVE SEARCH & RECRUITING | LAW FIRM | REAL ESTATE SERVICES | LAW FIRM | RECRUITING & STAFFING | |
| <div> GRAY BOX</div> | <div> [HomeStreet] Bank[®]</div> | <div> RENAISSANCE STRATEGIC ADVISORS</div> | <div> RIVETRY</div> | <div> FAMILY ESTATE</div> | |
| DIGITAL CONSULTING AGENCY | BANKING & FINANCIAL SERVICES | STRATEGIC CONSULTING, MERGERS & ACQUISITIONS | BRANDING & MARKETING AGENCY | WINERY & VINEYARDS | |
| ★ | | | | | |
| <div> BANNER BANK</div> | <div> Columbia Bank</div> | <div> INNOVATION FRAMEWORKS[®] <small>ENABLING GROWTH & PROSPERITY</small></div> | <div> JLL[®]</div> | | |
| BANKING & FINANCIAL SERVICES | BANKING & FINANCIAL SERVICES | BUSINESS CONSULTING & TRAINING | REAL ESTATE SERVICES | | |
| <div> localfresh</div> | <div> MOSSADAMS</div> | <div> OLES MORRISON <small>OLESS MORRISON BONNER BAKER LLP</small></div> | <div> PORT OF PORTLAND</div> | | |
| WEBSITE DESIGN & ONLINE MARKETING | ACCOUNTING & BUSINESS ADVISING | LAW FIRM | AIRPORTS, MARINE TERMINALS & INDUSTRIAL PARKS | | |
| <div> Schwabe WILLIAMSON & WYATT[™]</div> | <div> Sid Smith EOS[®] Implementer Predictable Trajectory</div> | <div> Seyfarth</div> | | | |
| LAW FIRM | BUSINESS CONSULTING & TRAINING | LAW FIRM | | | |
| KEY PARTNERS | | | | | |
| <div> business oregon.</div> | <div> GCAE <small>GOVERNMENT CONTRACT ASSISTANCE CENTER</small></div> | <div> WASHINGTON PTAC</div> | <div> STATE OF WASHINGTON</div> | <div> OMEP</div> | <div> IMPACT WASHINGTON</div> |
| STATE ECONOMIC DEVELOPMENT AGENCY | GOVERNMENT CONTRACT ASSISTANCE PROGRAM | GOVERNMENT CONTRACT ASSISTANCE PROGRAM | STATE ECONOMIC DEVELOPMENT AGENCY | OREGON MANUFACTURING EXTENSION PARTNERSHIP | WASHINGTON MANUFACTURING EXTENSION PARTNERSHIP |

NEW MEMBERS IN 2020

Join us in welcoming the over 50 new member companies who joined PNDC throughout 2020.

| | |
|---|------------------------------|
| Aero Precision | Insperity |
| Altech Aerospace | Kairos Consulting Northwest |
| Altek | Khan Machine Tool Co. |
| Apex Anodizing | Kittyhawk Products |
| B.E. Meyers | Luma Technologies |
| COE for Semiconductors and Electronic Manufacturing | Molinas Construction Company |
| Chi-Chack LLC | Northwest Sign & Design |
| Clark College | Norton Strategic Consulting |
| Clint Hatfield Trucking LLC | Pacific Office Solutions |
| Deployed Logix | Parisi Technologies |
| DTS LLC | PEI Manufacturing |
| Earth Cruiser | Port of Portland |
| Engineering Design Team (EDT) | Powerlight Technologies |
| Electroimpact | Proctor Products Co. |
| Freestone Enterprises LLC | Qualitel Corporation |
| FNI, INC | Seyfarth Shaw LLP |
| Greysam Industrial Services | SightLine Applications |
| Heliladder of Blue Moon Designs | Stack Metallurgical Group |
| Hobart Machined Products | TNT Aerospace |
| Homestreet Bank | Totem Technologies |
| Hyssos Tech | Transpak |
| I&H Construction | Washington State University |

AWARD WINNERS

At the 15th PNDC Annual Celebration on November 12, 2020 we announced the following award winners and long-term members, thanking them for their support, leadership, and service. Please congratulate these individuals and organizations.

PARTNER OF THE YEAR: IMPACT WASHINGTON

In 2020 we recognize Impact Washington's long-term support and recent collaboration on Cybersecurity programs to help Washington State businesses comply with evolving Department of Defense Cybersecurity requirements. With their support and leadership, many PNDC members in Washington State received reduced or no cost access to cybersecurity information and services.



Impact Washington's experts help small and mid-size manufactures think smarter, operate more efficiently, and develop sustainable business practices. Drawing on unmatched expertise in every facet, they work to support the manufacturing community with Value Drive Solutions. With a 20+ year record, they have a deep understanding of the opportunities and challenges that are unique to Washington State.

LES DE ASIS ANNUAL DEFENSE & SECURITY LEADERSHIP AWARD

Each year PNDC honors a leader who exemplifies selfless support of the community, leadership, and commitment to PNDC's mission. In 2020 we were very pleased to announce the recipient of this award:

Anna Reyes-Potts



Anna Reyes-Potts has served on the Board of Directors at PNDC since 2018 and has agreed to serve a second three-year term. She has supported PNDC through committee work as well; she first joined the marketing and membership committee but jumped to the scholarship committee since it was established. Anna believes workforce and education are of great importance to a strong economy.

Professionally, Anna recently joined Symphony Azima AI, a developer of process control products and services. She is enjoying her new role as manufacturing manager of devices and "gets to" manage one of their key SAAS programs. PNDC Members may know her previous company TMF, a CNC machine shop that she and her husband co-own with the Wood family, where she was General Manager and Business Developer. Today TMF is an important side gig.

This year this award is bitter-sweet, as many of you know Les de Asis, name sake of this leadership award, Benchmade Knife Company founder, and PNDC co-founder, passed away. Our sympathy goes out to his family and the wide community that knew and loved him. In many ways Anna Reyes-Potts embodies the long-term, enthusiastic dedication and leadership to the community that Les de Asis was known for, as well as "boot strapping" a closely held business that feels more like a family. She is always willing to help with leadership, advice, or just as a great sounding board. Anna "shows-up" and is very active in connecting and networking within the PNDC Community.

5 & 10 YEAR AWARD RECIPIENTS

PNDC would like to recognize the following businesses who have been members for FIVE YEARS and those who have been members for TEN YEARS. Thank you for your long-term support and engagement with our community.

FIVE-YEAR AWARD RECIPIENTS:



ABOM

Abom, Inc. is a wearable technology company and is in the business of inventing, producing, marketing, and selling innovative protective eyewear products to the military, industrial safety, and consumer markets. Abom's patented active anti-fog technology will not allow fog to survive in protective eyewear. Other applications are under development.

ARCTURUSUAV™

Arcturus UAV

Arcturus UAV manufactures long endurance unmanned aerial vehicles primarily for military ISR. The T-20 is a catapult launched UAV and the Jump 20 is a VTOL variant.



Cascade Engineering Technologies

Cascade Engineering Technologies is a multi-disciplinary contract manufacturer engaged in the manufacture and testing of aerospace airframe and engine components for both commercial aviation and defense sector. Cascade is known for manufacturing very complex, thin wall, monolithic structures for either casting, forging or hog-out applications. Cascade integrates internally developed "Real Time Metrology" to manage part/process variability and ensure finished part compliance. Tools utilized include CNC machining, assembly, dimensional inspections, and reverse engineering.

designPORT

DesignPORT

designPORT is a full-service engineering, product development, and CAD services firm focused on the development of innovative solutions. Equipped with the latest 3D CAD, FEA, CFD, and optical analysis software, designPORT is ready to solve your toughest design challenges. They specialize in propelling concepts and prototypes into successful and robust products.

LIEBHERR

Liebherr Aerospace & Transportation

Liebherr-Aerospace develops, produces, and services military aviation advanced air management, flight control, and landing gear systems as well as dedicated control electronics, power electronics and gearboxes for a wide range of applications such as tanker and refueling aircraft, transport and training aircraft, unmanned air vehicles, surveillance, and fighter as well as search and rescue aircraft.

NWETCH
PRECISION PHOTO CHEMICAL MACHINING

NW ETCH

NW Etch is your alternative machining method for flat, thin metal parts of complex design when other machining methods won't suffice. They provide burr-free and oil free aerospace parts without discoloration, warping, or structural changes to the metal. Their photo chemical machining results will impress with a clarity and precision not available via other methods, at a competitive price.

RanTECH
ENGINEERING & AEROSPACE, INC.

Ran-Tech Engineering & Aerospace

By using cutting edge technology to design quality into every sheet metal, machined, formed, or assembled product they produce, Ran-Tech consistently delivers the high performing parts you need to get your project completed on-time and to your standards. In order to maintain the high standards of quality for their products, Ran-Tech internally designs and manufactures tooling for all processes within the factory.

BOEING

The Boeing Company

The Boeing Company is committed to providing customers around the world with the right capabilities, at the right time, at the right cost. Boeing's Defense, Space, and Security business unit specializes in innovative, capabilities-driven solutions across platforms, services, and support, and information and technologies.

TMF
CNC MACHINING & MANUFACTURING

TMF

TMF provides precision CNC machining and manufacturing services to the aerospace and defense industries. They offer project management, engineering/CAD support, and assembly services. Niche products include custom electronic enclosures and latches. TMF has a skilled team, dedicated to quality and customer service. TMF is AS9100D and ITAR registered.

TEN-YEAR AWARD RECIPIENTS:



Arch Global Precision

ARCH Global Precision is a consolidated precision machining services company. Their nation-wide engineering and manufacturing facilities are dedicated to your critical part production and the delivery of products and subassemblies. ARCH combines the expertise of leading American manufacturers and expanding technologies to serve the aerospace & defense, medical, and industrial markets.



Exotic Tool Welding

Exotic Tool Welding (ETW) provides Nadcap accredited, certified welding & brazing services, as well as CNC tube fabrication services up to 1-1/2" OD to the A&D, medical, oil and gas & commercial industries in the PNW, US, and Canada. In the early '80's ETW achieved Boeing accreditation and has continued to attain approvals from other OEM's such as Lockheed Martin, General Dynamics, Raytheon.



GrovTec US

GrovTec is a U.S.-based manufacturer of firearm slings, sling swivels, ammo holders, holsters, and other firearm accessories. Weight, strength, stealth, security, and above all, unrelenting performance, are calling cards of their progressive designs. Beginning with raw materials and continuing through finished products, every characteristic, every tolerance, and every finish has been optimized.



ID Integration

ID Integration is a subject matter expert and systems integrator for aerospace and military RFID and barcode part marking/tracking requirements including IUID and Spec 2000. IDI offers innovative solutions using barcode, RFID and smart sensors for Work-in-process (WIP), Automated Asset Tracking Solutions, and Improved Supply Chain Control.



Oregon Institute of Technology (Oregon Tech)

Oregon Tech is a public university founded on the principles of excellence through hands-on, experiential teaching and learning. They believe in giving students a rigorous education through professional practice so students apply cutting-edge concepts to real-world issues. As a highly ranked public polytechnic university, they take pride in their mission to deliver bachelor's and master's degrees to students in the Pacific Northwest and beyond.



Zepher

Zepher is a manufacturing and systems integration company focused on the development and production of new technologies in aerospace and defense. Zepher supports the engineering, assembly and sustainment of electromechanical products through expertise in manufacturability and project management. Zepher's customers include OEMs and defense agencies.

COMMITTEE MEMBERS OF THE YEAR



Ben Parish, GRAYBOX

GRAYBOX is a digital agency of senior technicians and advisors who provide their partners with strategic, creative, technological and consultative services. Their offerings are delivered by four specialized and highly collaborative internal divisions: Application Development, Digital Marketing, Ecommerce, and Website Development. Through this open structure, they partner with clients to build and integrate practical business solutions that increase tangible ROI on their company's digital investments.



Sid Smith, Predictable Traction

Sid provides business growth and leadership development by implementing a complete, proven business management system with simple tools that improve project management, communication, culture, quality, operational excellence, employee retention, time management, and employee engagement. Real. Simple. Results. Initial training is free.



Karen Anderson, Acumen Executive and Talent Search

Dynamic leadership is essential. Acumen's value is proven with an 80-85% repeat business and client referral. Part of Acumen's success is their AcuSearch methodology in sourcing, qualifying, and recruiting the best candidates – based on your culture and specific needs. Results. Initial training is free.



Tyler Grover, GrovTec US

GrovTec is a U.S.-based manufacturer of firearm slings, sling swivels, ammo holders, holsters, and other firearm accessories. Weight, strength, stealth, security, and above all, unrelenting performance, are calling cards of their progressive designs. Beginning with raw materials and continuing through finished products, every characteristic, every tolerance, and every finish has been optimized.



Matt Simpson, JLL Corporate Real Estate Services

JLL's Corporate Real Estate Services team helps emerging and leading corporations align real estate strategies in support of their business goals and objectives locally and globally. From workplace strategy to negotiations, construction and move in they are in your corner.



THANK YOU

To all our member organizations and individuals who helped make this year a testament to the resiliency and selfless nature of everyone in our coalition. 2021 will still have its fair share of unknowns, but after pivoting and adapting to the challenges we faced this year, we have nothing but confidence that we'll do even more to support our members throughout 2021.

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