

THE  
**FUTURE**  
OF TECH IN AZ  

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ANNUAL REPORT 2019

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ARIZONA  
TECHNOLOGY  
COUNCIL  

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a place to connect and grow

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## LETTER FROM THE PRESIDENT + CEO

### When it comes to the future of technology in Arizona, you can expect practically anything to happen.

While I don't have any inside information to say exactly what lies ahead in the years, even months ahead, a sampling of activity in our state's technology community during the past year or so offers clues on what sectors should remain hot.

Autonomous vehicles have been a driving force when it comes to innovation in Arizona. No doubt you have heard more than a few times that Intel and Waymo are big names in the operation and testing of self-driving vehicles. Add to that Chandler-based Local Motors, developer of the first 3D-printed car, has been testing autonomous Olli, the first electric, cognitive shuttle. Showing nothing is too small when it comes to this growing field, residents in one Scottsdale ZIP code even had the option of getting their groceries delivered by self-driving vehicles.

On a grander scale, TuSimple has been developing self-driving commercial trucks in Tucson, with the company forecasting it will fill 500 jobs by the fall as planned expansion is expected to have an economic impact of \$1.1 billion in the first half of this decade. One sign of why TuSimple is so confident is its partnering with the United States Postal

Service to test 24-hour mail hauls between Dallas and Phoenix. Adding to its fleet of passenger vans, Waymo already has tested its self-driving Class 8 trucks in Arizona.

Expect more big news to come from Coolidge when the first self-driving hydrogen fuel cell trucks roll off the line at the Nikola Motor manufacturing facility. In addition, Nikola will be a major player in the additive manufacturing with one of the largest 3D printers in the world at its new research center/headquarters.

And to help vehicles get from Point A to Point B seamlessly, Imagry is creating the first mapless, autonomous-driving platform that trades in GPS for computer vision and artificial intelligence (AI). Imagry has its U.S. headquarters in Tempe.

Critical to autonomous driving is connectivity at the heart of the Internet of Things (IoT). Phoenix-based ON Semiconductor's experience developing sensors to make self-driving a reality is evident with its work with LiDAR, radar and cameras—the only manufacturer to make all three. This is only a small part of IoT's potential. Phoenix-based

Avnet is taking a lead by creating extensive networks upon which new technologies can be built so companies beyond Arizona can integrate IoT applications into existing hardware and software. Benchmark has developed critical technology to facilitate next-generation IoT and 5G. Sprint and Verizon are among the major telecommunications firms implementing 5G across the country. These innovations will lead to smarter cities, as well as safer autonomous vehicles.

Speaking of getting smarter, AI and machine learning can help us tap into data so we make smarter decisions, as researchers at our universities are discovering. The Eller College of Management Artificial Intelligence Lab at The University of Arizona is dedicated to AI research as it provides hands-on learning for students. AI and machine learning are a focus at Arizona State University's Consortium for Science, Policy and Outcomes.

There already are many applications of this new technology in various fields. Botco.ai and Scottsdale-based Digital Air Strike are implementing AI and machine learning technologies as part of their digital marketing tools. In cybersecurity, WiZR has developed AI-based computer vision technology with IoT integrations.

Arizona companies and organizations also are working to merge technology and health. The field—so far—includes Ventana Medical Systems (diagnostics), Medtronic (medical technology), PADT (medical devices), WebPT (physical therapy software) and the Translational Genomics Research Institute

(diagnostics and smarter treatments). Add to the list two Tucson-based medical device companies named to Deloitte's most recent annual roster of the fastest growing public and private technology companies. Accelerate Diagnostics was No. 34 with 3,757% revenue growth while HTG Molecular Diagnostics was No. 253 with 432% growth.

These companies and others, along with educational institutions and nonprofits are working to help Arizona create a competitive bioscience sector while making our state a national authority in select areas of the field by 2025.

While all of this progress shows that Arizona is no stranger to research and development, expect the trajectory for success to become even steeper with elimination of the some of the bureaucratic red tape that has derailed more than a few startups. I'm referring to the regulatory sandboxes that have been approved by Arizona lawmakers and Gov. Doug Ducey.

Financial technology, or fintech, is starting to gain some traction after active marketing of this sector's sandbox by the attorney general's office, which is responsible for its oversight, and groups like the Arizona Bankers Association. Innovations in blockchain and digital assets are expected to grow as a result of stringent regulations being eliminated.

In a related field, property technology, or proptech, also should gain some momentum now that its sandbox has been given the go-ahead. An example of the potential

**"As you turn these pages to review where we've been, keep in mind where we may be headed."**

can be witnessed in OfferPad, the Chandler-based company that offers an innovative approach to accelerate and simplify the home buying and selling experience.

I've just scratched the surface with this forecast for the short term. We at the Arizona Technology Council are getting a glimpse of what else might be coming as we watch our members actively engage in our own groups such as the IoT Committee, MedTech Roundtable and Additive Manufacturing Committee. And for the long-term? The Council already is working on that through our efforts to spearhead STEM programs like the Arizona SciTech Festival that are spurring the interests of a new generation.

So, as you turn these pages to review where we've been, keep in mind where we may be headed. After all, it's your future, too.



Steven G. Zylstra, Sc.D. (Hon.)  
President + CEO

# INTRODUCTION + OVERVIEW

**Arizona's premier trade association for technology- and science-driven companies, the Arizona Technology Council is the driving force behind making the state the fastest-growing technology hub in the nation, connecting and empowering Arizona's community of innovation.**

A private, not-for-profit organization, the Council fosters a climate of creativity, innovation and community for its members to enhance technology and the lives of the people of Arizona. Supporting the development, growth and advancement of innovation in Arizona, the Council proactively identifies and enhances capabilities and helps eliminate impediments that Arizona technology companies face.

The Council works towards furthering the advancement of technology in Arizona through leadership, education, advocacy and social action. The Council offers numerous events, educational forums and conferences that bring together leaders, entrepreneurs and visionaries to make an impact on the technology sector.

With well over 800 members, the Council is Arizona's only statewide organization serving

the technology industry. Providing member companies with marketing and business development opportunities, discounts on products and services, and the advocacy of business-focused legislation to grow the state's economy, the Council is recognized as one of the most important trade organizations in the state.

With the support of our members, sponsors and partners, the Council is a trusted resource in strengthening Arizona's technology industry and accelerating the innovation and entrepreneurial mindset already present in our expanding innovation ecosystem. Together we are creating the destination for technology companies to be, to thrive and to stay.

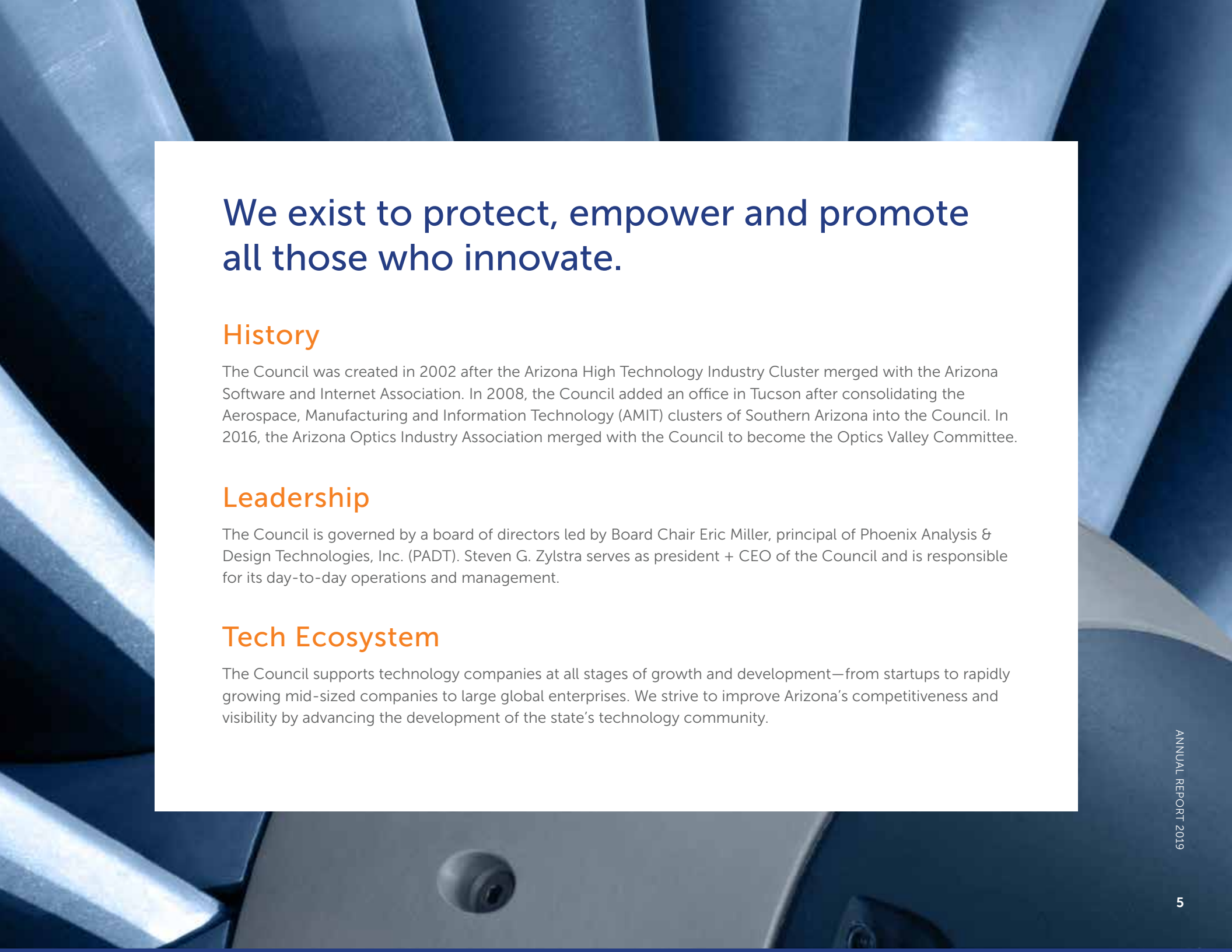
## THE COUNCIL'S PURPOSE IS TO:

Connect and strengthen Arizona's technology industry and community.

Promote state and federal policies that enhance Arizona's technology industry.

Deliver quality content and events to educate those working in Arizona's expanding technology sector.

Accelerate the innovation and entrepreneurial mindset already present in our growing startup ecosystem.



# We exist to protect, empower and promote all those who innovate.

## History

The Council was created in 2002 after the Arizona High Technology Industry Cluster merged with the Arizona Software and Internet Association. In 2008, the Council added an office in Tucson after consolidating the Aerospace, Manufacturing and Information Technology (AMIT) clusters of Southern Arizona into the Council. In 2016, the Arizona Optics Industry Association merged with the Council to become the Optics Valley Committee.

## Leadership

The Council is governed by a board of directors led by Board Chair Eric Miller, principal of Phoenix Analysis & Design Technologies, Inc. (PADT). Steven G. Zylstra serves as president + CEO of the Council and is responsible for its day-to-day operations and management.

## Tech Ecosystem

The Council supports technology companies at all stages of growth and development—from startups to rapidly growing mid-sized companies to large global enterprises. We strive to improve Arizona's competitiveness and visibility by advancing the development of the state's technology community.

# PUBLIC POLICY + ADVOCACY

## LEGISLATIVE

### **The Arizona Technology Council is the principal advocate for science- and technology-based companies in Arizona.**

The Council continuously monitors federal, state, and local legislation and policies that impact the sustainability and growth of Arizona's technology industry. Through the collective strength of its members, the Council informs and educates policymakers on issues that are important to Arizona's technology sectors.

From the U.S. Congress and the Office of the Governor to legislative committee rooms and city halls across the state, the Council serves as the voice calling for a technology-based, pro-growth, business-focused agenda:

- Look for opportunities to continue proven economic development programs such as the Angel Investment Tax Credit and current levels of the Research and Development Tax Credit.
- Support improvements to Arizona's tax system that strengthen competitiveness and fairness and are predictable. Specifically, that includes:
  - Ensure Arizona conforms to the recently passed federal tax law changes.
  - Recommend statutory clarification concerning the taxation of digital goods and services.
  - Endorse legislation that ensures Arizona complies with the U.S. Supreme Court's Wayfair decision that allows states to tax remote sellers.

- Consistently and sustainably fund the state's education system, including pre-K, K-12, CTE, equitable access to dual enrollment, and postsecondary programs, as well as keeping the 20% teacher raise by 2020.
- Restore fourth-year career and technical education (CTE) funding for programs that take four years to complete in key industries crucial to Arizona's continued economic development such as engineering and manufacturing.
- Promote the adoption of necessary statutes, guidelines, rules or agency positions that are needed to allow Arizona to leverage the federal rulemaking that enables associations to provide substantially enhanced Association Health Plans (AHPs) that will offer cost-effective health benefits to their members.
- Champion the efforts of Arizona's Institute of Automated Mobility and work to help advance all aspects of automated vehicle science, safety and policy with the integration of technology into Arizona's transportation systems.
- Advocate programs for smart cities development, including support of a bill at the federal level that requires public infrastructure to consist of broadband connectivity, smart technologies to enhance public utilities and cyber solutions to secure the energy grid.

The Council was successful in achieving many of the priorities at the Legislature due in large part to the Public Policy Committee working closely with government relations firm at Public Policy Partners (P<sup>3</sup>).

Providing technology companies with better healthcare options was a key priority of the Council in 2019. In March, the Council urged support for Senate Bill 1085 to enable affordable health coverage for small businesses. The bill introduced by Sen. Brophy McGee created a pathway for association health plans, allowing small employers to band together to purchase fully insured and self-insured coverage options that were previously only available to large employers.

The Council also advocated for renewable energy in 2019. As the Greater Phoenix region gets closer to becoming a major tech hub, it's important that Arizona embraces renewable energy technologies that not only have a much lower environmental impact but also provide energy security for existing businesses and tech startups, increase energy independence, and help drive economic development. The Council strongly encouraged the Arizona Corporation Commission (ACC) to increase Renewable Energy Standard & Tariff (REST) up to 50% renewable energy by 2030 to reflect recent energy technology advances and new market realities. Arizona's current REST was adopted by the ACC in Nov. 2006 to require 15% of energy generated be from renewable resources by 2025. Over a decade later, REST has proven to be a valuable policy to increase renewable energy in Arizona. While the 2006 increase was notable, Arizona has since fallen behind many other states in the region and across the country in setting a strong REST.

Appropriately funding the state's education system including pre-K, K-12, JTED, CTE and post-secondary education was one of the Council's top



legislative priorities. The most significant issue of the 2018 session and each session thereafter has been education funding and increasing teachers' pay. The 2018 session gave way to the 20x2020 plan, which was something supported by the Council. In addition, the Council has supported acceleration of additional assistance dollars. The fiscal 2019 budget marked the largest investment of new K-12 funds in over a decade, with additional funding for new school construction, school infrastructure improvements, CTE, JTED completion grants and computer science teacher professional development program.

Another priority for the Council was restoring the fourth-year funding for CTE. This ran into some trouble in the House and will continue to be something for the Council to advocate.

Other key pieces of legislation strongly supported by the Council and signed by the governor included:

- **SB 1085 – Association Health Plans:** This bill stipulates an association qualifies as a path 1 bona fide association if the association meets currently specified statutory requirements for a bona fide association. An association qualifies as a path 2 bona fide association if the association meets specified requirements of federal law. An insurer electing to offer health benefits plans through a bona fide association to small employer groups of one is not required to make health benefits plans available as required by specified statute to small employer groups of one if the small employer is not seeking a health benefits plan through a bona fide association. Does not limit or prohibit the issuance of self-funded health benefits plans in Arizona through a bona fide association if the association is established and operating in compliance with applicable provisions of the federal Employee Retirement Income Security Act of 1974. By January 1, 2020, Arizona's Department of Insurance was required to post information on its public

website that summarizes applicable state law and any other pertinent information related to association health plans. (Sen. Kate Brophy McGee)

- **HB 2423 – Space Flight Activities; Release Agreement:** This bill stipulates that a space flight entity is authorized to enter into a liability release agreement with a space flight crew. Contains a legislative intent section. (Rep. Jeff Weninger)
- **HB 2673 – Property; Products; Services; Sandbox:** This bill establishes a new chapter in Title 18 (Information Technology) requiring the Arizona Commerce Authority to establish a Property Technology Sandbox Program in consultation with applicable state agencies to enable a person to obtain limited access to the market in Arizona to test "innovative property products or services" (defined) without obtaining authorization that otherwise might be required. Establishes application requirements and an application process for participation in the Program. If the Authority approves an application for entry into the property technology sandbox, the applicant is deemed a sandbox participant and has 24 months after the date of approval to test the innovation described in the sandbox participant's application. Before providing an innovative property product or service to consumers, a sandbox participant is required to disclose to consumers a list of information. Establishes exit requirements, record keeping and reporting requirements. Does not apply to regulated real estate professions. The program terminates July 1, 2029. (Rep. Jeff Weninger)
- **HB 2757/SB 1546 – Omnibus Tax Provisions:** After quite the battle over how and when to apply the federal Tax Cuts and Jobs Act to Arizona, a deal was finally reached. Those details are:

- Reduces income brackets from five to four brackets
- For single filers, the standard deduction increases from \$5,312 to \$12,000
- For married filers, the standard deduction increases from \$10,613 to \$24,000
- Gives a new child tax credit of \$100
- Gives a charitable tax subtraction of 25%
- **Wayfair:** A remote seller who sells products in Arizona is required to pay the Transaction Privilege Tax (TPT) if they meet the following criteria:
  - The gross proceeds of sales or gross income derived from the remote seller's business with customers in Arizona that is not facilitated by a marketplace facilitator is more than \$200,000 in calendar year 2019, \$150,000 in calendar year 2020, and \$100,000 in calendar year 2021 and after.
  - If the person is a marketplace facilitator, the gross proceeds of sales or gross income derived from the marketplace facilitator's business on its own behalf or on behalf of at least one marketplace seller with customers in Arizona is more than \$100,000.
  - For the purposes of determining whether a person meets any of these criteria, all affiliated persons must be aggregated.
  - A marketplace facilitator is required to report the TPT due from transactions facilitated on behalf of marketplace sellers and is permitted to report the TPT due with the TPT collected from transactions made directly by the marketplace facilitator on a combined tax return or on a separate return. (Rep. Ben Toma and Sen. Karen Fann).

# STRATEGIC PLAN

## THE FUTURE OF TECH IN ARIZONA

**Empowering Arizona's technology community does not happen without a multitude of great minds coming together and playing a pivotal role to establish priorities, strengthen operations and achieve targeted goals.**

Leading an organization that's built to last takes strategic planning. With that in mind, the Arizona Technology Council continuously reviews and tests its value proposition.

In 2018, the Council launched a transformation process that ultimately led to the development of a new strategic plan. The Council enlisted David Lee of MSS Business Transformation Advisory and Doug Reid of Douglas Reid and Associates to conduct a holistic review of the organization, its purpose, its vision and the value it delivers to members.

The culmination of the Council's strategic planning in 2018 resulted in the creation of seven strategic pathways. Each pathway is sponsored by an executive committee member who leads a task force comprised of Council staff, board members, members at large and industry experts. The strategic pathways represent the consolidated themes that the Council has put into action to achieve its vision and execute on the strategic plan.

In 2019, the seven strategic pathways have made great headway. Initiative 2 led by Board Chair Eric Miller facilitated the restructuring of the sales team and developed a process to improve enterprise sales. Initiative 5 continued to lead the way with the launch of AZTechBase.com, which will be a great resource for companies in Arizona to learn more about the technology ecosystem. Finally, initiatives 1 and 5 have collaborated with the Council's Ambassador Committee to develop processes for greater engagement with members.

### **Initiative 1:**

#### **INCREASE ENGAGEMENT WITH MEMBER COMPANIES**

John Talcott, Ballard Spahr

### **Initiative 2:**

#### **GROW MEMBERSHIP AND REVENUE**

Eric Miller, PADT Inc.

### **Initiative 3:**

#### **BUILD A STRONGER MORE DIVERSE TALENT PIPELINE**

Steven G. Zylstra, Arizona Technology Council

### **Initiative 4:**

#### **GROW VENTURE CAPITAL INVESTMENT IN ARIZONA**

Eric Lewis, EY

### **Initiative 5:**

#### **CREATE THE MOST CONNECTED, INTEGRATED AND ACTIVE TECHNOLOGY COMMUNITY**

Steven G. Zylstra, Arizona Technology Council, and Robert Witwer, Honeywell (retired)

### **Initiative 6:**

#### **SYSTEMICALLY IDENTIFY AND ADDRESS MEMBER NEEDS**

Michael Hawksworth, MSS Business Transformation Advisory

### **Initiative 7:**

#### **BUILD IMAGE AND AWARENESS OF ARIZONA AS A DESTINATION FOR TECH COMPANIES**

Rebecca Clyde, Ideas Collide

# ARIZONA

## A PLACE TO CONNECT + GROW

### Values:

- Lead on the edge
- We have your back
- Work together
- Get the right things done
- Be a trusted resource

### Vision:

Together we are creating the destination for technology companies to be, to thrive, and to stay.

### Mission:

We promote, advocate, educate, inform and connect our members and their enterprise.

# SIGNATURE EVENTS

## ONGOING EVENTS



### after5 Technology Mixers

The after5 Tech Mixer is the Council's premier networking event. Designed to bring together technologists, entrepreneurs, service providers and prospective members in a relaxed, afterwork setting, event series is hosted by a Council member company and is free for members. Light hors d'oeuvres and refreshments are provided by the host company. The events typically are held at technology companies, giving guests an opportunity for a tour or product demonstrations. In Phoenix, every fourth after5 is a VIP reception held after the Council's quarterly board meeting.

#### 2019 RESULTS:

Phoenix events: **8**

Tucson events: **11**

Total attendance (Phoenix): **1,048**

Total attendance (Tucson): **1,098**



### Lunch and Learn Series

The Lunch and Learn Series is presented by a member company on a rotating basis. The purpose of the series is to provide an opportunity for members to learn about a topic or product from a variety of industries while enjoying lunch with other business professionals. Lunch and Learn events are always free for Council members to attend. In 2019, one of the Tucson events was a special State of the Council breakfast at which Steven G. Zylstra, the Council's president + CEO, presented a comprehensive summary of Arizona Technology Council and Foundation activities.

#### 2019 RESULTS:

Phoenix events: **29**

Tucson events: **13**

Total attendance (Phoenix): **1,096**

Total attendance (Tucson): **640**



### VIP Tech Mixer Networking Events

Held in conjunction with the Arizona Technology Council's quarterly board of directors meeting, the VIP Networking Events include attendees from the Council's board, Council members and prospective members.

#### 2019 RESULTS:

Number of events: **4**

Total attendance in 2019: **455**





## MedTech Conference

The Council's MedTech Conference brings together health care innovators, influential policymakers and other health care service professionals committed to promoting and supporting the industry in a uniquely multifaceted environment designed to showcase Arizona's innovative medical technology. The conference advances industry discussion from key perspectives through expert panel sessions, keynote speakers and product exhibits to provide opportunities in education, business development, capital formation and networking. Keynote speakers included Rick Hall, senior director of health innovation at Arizona State University's Edson College of Nursing and Health Innovation, and Michael Berens, deputy director at the Translational Genomics Research Institute (TGen).

### 2019 RESULTS:

**Total attendance: 185**



## Cybersecurity Summit

The Council and the Arizona Cyber Threat Response Alliance (ACTRA)/ Arizona InfraGard presented the sixth annual Cybersecurity Summit in 2019. This educational breakfast summit provided actionable solutions, resources, products and services geared toward helping businesses to protect intellectual property and customer data. Keynote speaker Michael McAndrews, vice president of network security services at WGM Associates, discussed network forensics, security engineering and the dark web. Frank Grimmelmann, president and CEO of Arizona InfraGard, moderated a cybersecurity panel of experts from Gov. Doug Ducey's Arizona Cybersecurity Team.

### 2019 RESULTS:

**Total attendance: 168**



## Aerospace, Aviation, Defense & Manufacturing Conference

Each year the Council collaborates with the Arizona Commerce Authority (ACA) to stage the state's only Aerospace, Aviation, Defense and Manufacturing Conference. For defense prime contractors, the event offers the chance to take the spotlight to explain their needs to subcontractors. Smaller manufacturers and service providers have the opportunity to talk directly with A&D decision-makers to learn how to best meet their requirements and showcase their capabilities.

Opening keynote speaker Mike Stewart, vice president of advanced technology at Honeywell Aerospace, discussed the transformation of the aerospace industry and astronaut Ron Garan, senior vice president of mission operations at World View Enterprises, delivered an impactful closing keynote.

### 2019 RESULTS:

**Total attendance: 172**

## ANNUAL CONFERENCES + EXPOS (CONT)



### CEO Retreat

The two-day CEO Retreat in Prescott gathered technology industry visionaries, business owners, company leaders, presidents and CEOs for interactive workshops, engaging speakers, thought-provoking keynotes, panel discussions, golf, a tour of Embry-Riddle Aeronautical University's Cybersecurity Center, a wine-tasting event at Superstition Meadery and reception at Thumb Butte Distillery. Featured speakers included Andrew Lombard, executive vice president of innovation and venture development of the ACA, and Katharine Halpin, founder and CEO of The Halpin Companies. Keynote speaker Matthew Clyde, CEO of Ideas Collide, discussed why investing in a good culture makes a great brand. Closing keynote speaker Rick Smith, CEO and founder of Axon, discussed the future of policing and using technology to solve violence.

#### 2019 RESULTS:

Total attendance: **177**



### Smart City + IoT Conference

In 2019, the Council presented the third annual Smart City Summit & IoT Conference. This informative and thought-provoking summit explored the landscape of smart city strategies, emerging best practices and challenges to implementation, and the specific strategies needed to bring a smart city vision to reality. Speakers at the event included Marisa Walker, senior vice president of Infrastructure at the ACA; Julie Kae, executive director of Qlik; Curt Cornum, vice president of global business transformation at Insight; Chris Richardson, deputy CIO at ASU; Amol Ajgaonkar, chief architect at Insight; Mark Goldstein, president of the International Research Center; Nitsa Einan, vice president of business development at Imagery; C.J. Berg, energy innovation analyst at APS; and Dominic Papa, vice president for smart state initiatives at the ACA.

#### 2019 RESULTS:

Total attendance: **177**



### Tech the Halls 2019 Holiday Event

Each year, the Council's Ambassador Committee presents the best tech holiday event in the Valley and 2019 was no exception. Beer-pouring robots were provided by In-Position Technologies and Grand Canyon University (GCU) provided a laser-light obstacle course, robotic mini golf challenge and binary code game. American Express was the presenting sponsor, with Ballard Spahr sponsoring the VIP lounge. University of Advancing Technology provided a virtual reality experience to enthusiastic attendees, and the cigar bar was sponsored by iSolved and Delta Technology. Proceeds from the exclusive raffle went to STEM programs, including GCU Middle School STEM Camp and University of Advancing Technology students.

#### 2019 RESULTS:

Total attendance: **322**



### Marketing Technology Summit

Presented by the Council, the Phoenix chapter of the Business Marketing Association and KEO Marketing, the 10th annual Marketing Technology Summit featured interactive and engaging panel discussions, cutting-edge marketing technologies, emerging best practices and challenges facing business marketers in the 21st century. The 2019 event featured keynote speakers Tania Katan, CEO of Creative Trespassing; Steve Johnson, vice president of products at Pragmatic Marketing; Jamie Glass, CMO and founder of Artful Thinkers; and Dara Schulenberg, research director of channel marketing strategies at Forrester. Sponsors included KEO Marketing, Botco.ai, Prism Global Marketing Solutions, AccountabilIT, Pacific Office Automation and iSolved.

#### 2019 RESULTS:

Total attendance: **185**



## 2019 Golf Tournaments

The Council hosts annual golf tournaments in Phoenix and Tucson. In January 2019, 92 golfers registered for the tournament at Troon North Golf Club in Scottsdale. In May 2019, 144 golfers participated in the ninth annual Tucson golf tournament at the Lodge at Ventana Canyon. Both events included lunch, raffle prize drawings and an awards ceremony.

### 2019 RESULTS:

**Number of events:** 2

**Total attendance:** 236



## 2019 Southern Arizona Tech + Business Expo: Where Technology and Manufacturing Connect

The Council along with the ACA celebrated the seventh annual Southern Arizona Tech + Business Expo in October 2019 with over 80 exhibitors and 450+ attendees. Keynote speaker James C. Wyant, professor emeritus of optical sciences at The University of Arizona, discussed "The Past, Present and Future of Optics in Tucson." Other featured presentations covered the speed of transformation in manufacturing, 5G reality, artificial intelligence in health care, and the evolution of augmented reality/virtual reality for gains in productivity.

**The Quarles & Brady 2019 Tech + Business Expo winners were:**

**Distinguished Service Award:**  
[Strategy 1](#)

**Southern Arizona Member Organization of the Year:**  
[The University of Arizona](#)

**Southern Arizona Innovator of the Year:**  
[FreeFall Aerospace](#)

**Southern Arizona Manufacturer of the Year:**  
[Yarbrough Electronics Sales](#)

### 2019 RESULTS:

**Total attendance:** 479



## Cybersecurity Lunch Forum

In 2019 the Council and ACTRA/ Arizona InfraGard hosted the fifth annual Cybersecurity Lunch Forum. The event allowed government and business leaders to learn about the threats, vulnerabilities and consequences related to data security and privacy matters. This educational forum provided actionable solutions, as numerous real-world practitioners discussed their available resources and experiences geared toward helping protect intellectual property and customer data..

### 2019 RESULTS:

**Total attendance:** 66

## ANNUAL CONFERENCES + EXPOS (CONT)



### Governor's Celebration of Innovation

An annual showcase of our state's incredible leadership in science and technology, the Governor's Celebration of Innovation (GCOI) is the Council's annual awards gala hosted in partnership with the ACA to honor Arizona's top leaders in business, innovation, technology and government. The 16th annual GCOI event in 2019 featured Gov. Doug Ducey, and attracted 850 attendees and 51 exhibitors showcasing their innovations. Twenty-eight awards were presented during the awards ceremony to technology companies, community leaders and students from throughout the state. The 2019 event was held at the Phoenix Convention Center.

### 2019 RESULTS

Total Attendance: **850**

## 2019 GCOI Award Winners

### AccountabilIT Lifetime Achievement Award

**James C. Wyant**

Professor Emeritus, James C. Wyant College of Optical Sciences, The University of Arizona

### MSS Business Transformation Leader of the Year Award

**Angel MedFlight Worldwide Air Ambulance**

### Ed Denison Business Leader of the Year

**Fletcher J. McCusker**, CEO, UAVenture Capital

### Innovator of the Year: Large Company

**AgJunction Inc.**

### Innovator of the Year: Startup Company

**FreeFall Aerospace, Inc.**

### Innovator of the Year: Small Company

**Prime Solutions Group, Inc.**

### Innovator of the Year: Academia

**Louise Hecker**

The University of Arizona

### Judge's Award

**Qwick**

### Legislative Award Winners

**Senator of the Year:** Kate Brophy McGee

**Representative of the Year:** Ben Toma

### Tech 10 Award Winners

**Sen. Karen Fann**, District 1

**Sen. David Bradley**, District 10

**Sen. Heather Carter**, District 18

**Sen. Sean Bowie**, District 18

**Rep. Alma Hernández**, District 3

**Rep. Regina Cobb**, District 5

**Rep. Nancy Barto**, District 15

**Rep. Jennifer Pawlik**, District 17

**Rep. Jeff Weninger**, District 17

**Rep. Michelle Udall**, District 25

### Future Innovators of the Year Award Winners

**Ella Wang**

BASIS Chandler High School, Chandler

**Emily Ignatoff**

Tanque Verde High School, Tucson

**Sky Harper**

Navajo Preparatory High School, Farmington, New Mexico

**Yutan Zhang**

BASIS Scottsdale High School, Scottsdale

### Future Innovators of the Year

#### Honorable Mentions

**Hannah Guan and Maghna Ramesh**

Hamilton High School, Chandler

**Matthew Fosdick**

Empire High School, Tucson

### Teacher of the Year Award Winner

**Katy Gazda**

Red Mountain High School, Mesa

### Teacher Honorable Mentions

**Oguz Guvenc**

Sonoran Science Academy, Gilbert





**Steven G. Zylstra** | President + CEO, Arizona Technology Council and SciTech Institute  
**Doug Stetson** | CEO, FreeFall Aerospace, Inc.  
**Sandra Watson** | President and CEO, Arizona Commerce Authority

# MARKETING + COMMUNICATIONS

Promoting the technology industry and our members, as well as publicizing the benefits and activities of the Arizona Technology Council, are key to growing membership and increasing awareness of the state's technology industry.

## Public Relations

The Council uses a proactive public relations (PR) program led by Scottsdale-based PR, content marketing and communications strategy firm TechTHiNQ. The strategic effort strengthens the Council's brand in the media and positions the Council as the go-to source for information on the technology industry in Arizona. As a commentator and analyst, Council President + CEO Steven G. Zylstra writes regular columns in the Phoenix Business Journal, AZ Business Magazine, In Business Magazine and TechConnect on such topics as net neutrality, angel investing, STEM and fintech to contribute to the overall publicity for the technology industry in Arizona. In 2019, the Council issued 24 press releases on topics such as the launch of the Council's association health plan in partnership with Blue Cross Blue Shield of Arizona, the TECNA innovation awards, efforts to support passage of key education legislation and economic development programs such as the Angel Investment Tax Credit and current levels of the Research and Development Tax Credit, and the announcement of the Governor's Celebration of Innovation award finalists and winners. More than 100 stories appeared in the media as a result. Additionally, Zylstra and the Council contributed to multiple media outlets regarding hot topics in technology in 2019, including KTVK 3TV and KPHO CBS 5, KNXV-TV ABC 15, The Arizona Republic, Phoenix Business Journal, Arizona Daily Star, KJZZ, KTAR and Arizona Capitol Times.

## 2019 RESULTS

Number of press releases: **24**

Number of published stories: **187**

## Website

With a homepage revamp, a new association health plan microsite and added features by KEO Marketing, aztechcouncil.org serves as the primary resource for information about the Council and the technology industry in Arizona. Information on the website includes industry and community events, Council signature and networking events, press releases, board members, member news, an online job board, resources for Council members and the local technology sector, and the Council's membership directory. Year-over-year, monthly organic sessions are up 26.39% from 2,747 in 2018 to 3,472 in 2019. Strategies targeting content optimization and search engine optimization from valued member Social SEO have improved the Council's keyword rankings in a number of categories.

## 2019 RESULTS

Average monthly organic sessions: **3,472**

Average monthly impressions: **203,384**

## TechConnect Magazine

TechConnect is the only magazine that has covered Arizona's science and technology community for more than a decade. Launched by the Arizona Technology Council in 2005, TechConnect has been dedicated to covering innovation and technology in Arizona and beyond. Produced in partnership with the Arizona Commerce Authority (ACA), the digital e-mag is produced quarterly and provides news about the state's leading companies, emerging companies and their technologies, as well as the latest industry trends and critical issues that drive Arizona's technology ecosystem. Dedicated to covering innovation in Arizona and beyond, TechConnect showcases Arizona's technology community through profiles, feature stories, R&D analysis, entrepreneur spotlights and trend reports. The themes in 2019 were biotechnology, smart cities, energy and fintech. In late 2019, the Council and the ACA began transitioning the publication to a blog format. Users will notice a new, clean look. An added feature is that visitors to the site will have the ability to print and share individual pages.

## 2019 RESULTS

Number of issues: **4**

Circulation: **37,512**

## AZ Business Magazine

Readers of AZ Business Magazine receive in-depth news and analysis on Arizona's technology community provided by Council President + CEO Steven G. Zylstra. Since 2012, Zylstra has authored his technology column for each issue of the bimonthly magazine, focusing on various technology sectors, notable leaders, important news, public policy and more. The articles provide highlights on the success, opportunities and growth, as well as economic and public policy pain points within Arizona's technology industry.

### 2019 RESULTS

Circulation: **30,000**

## TechTalk eNewsletter

The monthly TechTalk e-news is published at the end of every month. The newsletter provides featured segments on annual sponsors, content from the Council's blog, member updates, sustainability and renewable energy, R&D, technological advancements, emerging tech sectors, industry news and more.

### 2019 RESULTS

Number of Newsletters Sent: **12**

Number of Total Recipients: **81,540**

## TechFlash

In 2019, the Council continued to contribute a monthly technology blog published by the Phoenix Business Journal. Featuring industry thought leaders and influencers, the blog provides insight into Arizona's science and technology industry. The blog is read by 421,764 monthly unique visitors and 23,780 daily enews subscribers.

### GUEST BLOGGERS IN 2019

**Steven G. Zylstra**

Arizona Technology Council

**Alexi Venneri**

Digital Air Strike

**Eric Miller**, PADT

**Russ Yelton**, Perimeter83

The Council maintains a special relationship with InMedia Company to publish an eight-page editorial section three times annually in the monthly In Business Magazine. Reported and written by Council Editor Don Rodriguez, with contributions from staff and Council members, the content focus includes the Council's role and impact on the statewide technology community, public policy developments and event updates.

### 2019 RESULTS

Readers per issue: **98,000**

## Social Media

The Council loves to engage with its members, partners and friends on social media platforms. In 2019, the Council published updates on Facebook, LinkedIn, Twitter and Instagram. These channels are used to communicate Council news, member updates, new member and sponsor spotlights, industry information, event promotions and the accomplishments made by the Council and its innovative members.

### 2019 RESULTS

#### LinkedIn

Company page followers in 2019: **5,286**

Company page followers in 2018: **3,419**

**54.60% increase in followers**

#### Facebook

Number of followers in 2019: **3,985**

Number of followers in 2018: **2,927**

**36.14% increase in followers**

#### Instagram

Number of followers in 2019: **1,030**

Number of followers in 2018: **823**

**25.15% increase in followers**

**251% increase in number of posts from 2017**

#### Twitter

Number of followers in 2019: **8,068**

Number of followers in 2018: **7,671**

**5.17% increase in followers**



# TECH EMPLOYMENT

## Workforce Development

In 2019, the Arizona Technology Council continued to work to help bridge the skilled talent gap that challenges members across industries and disciplines. The Council continued its active support of initiatives aimed at developing and supporting a robust, aligned education and workforce development system—and proactively supporting science, technology, engineering and math (STEM) education at all levels.

Such a system of support provides the foundation for a healthy Arizona technology community and innovation economy by:

- Supporting talent development through formal education from pre-K through college, informal workplace and work-like experiences, and on-the-job training.
- Enabling the attraction and retention of the talent—in-state or imported—needed for Arizona to thrive as a technology hub.
- Aligning with the needs of companies for STEM workers now and in the future.

## Policy and Advocacy

The Council continued to advocate advancing the agenda of education for a skilled workforce through its public policy and legislative action during the Legislature's 2019 session. Key areas of focus included:

- Restoration of fourth-year career and technical education (CTE) funding for programs that take four years to complete in key industries crucial to Arizona's continued economic development such as engineering and manufacturing.
- Consistent and sustainable funding of the state's education system, including pre-K, K-12, CTE, equitable access to dual enrollment, and postsecondary programs, including the continued implementation of Gov. Doug Ducey's plan to provide 20% teacher raise by 2020.
- Continued funding for the Computer Science Professional Development teacher-training program aligned with the new Arizona K-12 computer science standards, and prioritizing underserved and rural schools so there can be a wider deployment of computer science classes for students across the state.

In addition to the Council's direct policy advocacy, Council President + CEO Steven G. Zylstra serves on numerous committees and boards to further advocate for a robust, aligned education and workforce development system. Those include the policy committee of the Phoenix Coding Academy Advisory Council; Arizona Science and Engineering Fair; Sonoran Schools Advisory Board; Paradise Valley School District Center for Research, Engineering, Science and Technology (CREST) Advisory Board; and the Arizona Department of Education's CTE Quality Skills Commission.





## Talent Attraction, Retention + Development

One of the Council's key areas of focus in workforce development in 2019 continued to be cybersecurity—a pressing area of demand among employers and a continuing opportunity for synergy between the Council and other organizations working to bridge the talent gap. The Council continued its partnership with the Greater Phoenix Chamber Foundation in the AZ Cybersecurity Workforce Collaborative.

The Collaborative continues to pursue innovative work-based and work-like models to help develop talent as early as high school, including internships for students and teachers, as well as apprenticeship models promoted at the national level for use in professional high-tech jobs. Key results of the partnership include:

- The launch of Apprenti Arizona, a high-tech, mid-level apprenticeship program with SRP and a cohort of 10 employees redeployed from the closed Navajo Generating Station that provided hands-on training to become IT business analysts.
- The launch of a high school cybersecurity apprenticeship program at Kudelski Security in partnership with the Collaborative, the Center for the Future of Arizona and PXU Coding Academy.
- Support of the 10th anniversary of the National Initiative for Cybersecurity Education conference in Phoenix that included a pre-conference business outreach event, pre-conference sessions and conference panels that featured Steven G. Zylstra, the Council's president + CEO; Jennifer Mellor, vice president of the Greater Phoenix Chamber; and Tim Roemer, Arizona's chief information security officer.

## Arizona Cybersecurity Team (ACT)

ACT was launched by Gov. Doug Ducey in March 2018 to enhance statewide collaboration among key stakeholders to address cybersecurity issues and provide recommendations for the development of Arizona as a leader in cybersecurity. The team is a well-rounded group of experts from state, local and federal government, as well as private sector and higher-education leaders, including Council President + CEO Steven G. Zylstra and the co-chairs of the Council's Workforce Development + Education Committee, who serve on ACT's Workforce, Economic Development and Education Subgroup.

The recommendations ACT provided to the governor in late 2019 included:

- Leverage information sharing, collection and analysis within and between government agencies and businesses
- Increase the speed of disseminating information
- Strengthen incident response
- Enhance consumer protections
- Create a unified state brand (CyberAZ)
- Create a statewide governor's call to action to accelerate cybersecurity best practices for K-12 students
- Extend opportunities to support the cyber talent pipeline

## TECH EMPLOYMENT (CONT)

### Industry + Education Alignment

In fall 2019, the Collaborative conducted the first high-level, district-wide curriculum review with business and education partners and all 10 Maricopa Community Colleges.

Other industry-education alignment related work supported by the Council in 2019 included:

- Active membership in the Maricopa County Community College District IT/Cyber Industry Sector Collaborative, which consists of faculty members from colleges across the district.
- Colleges and universities across the state that received and renewed their certifications as Centers of Academic Excellence from the National Security Agency and the Department of Homeland Security.
- Articulation agreements developed between Arizona State University and the Maricopa Community College District.
- Pima Community College's preparation to launch its new cybersecurity program, including an on-site cyber range.





# ELECTRONICS + TECHNOLOGY RECYCLING

## 2019 TECHTERRA INITIATIVE

To improve electronics recycling efforts and increase awareness of keeping dangerous materials out of landfills, the Arizona Technology Council partnered with electronics recycling company R3eWaste for the Council's annual TechTerra recycling initiative in April 2019.

Electronic devices contain many materials that are harmful to the planet. Nearly 15 million tons of e-waste is generated in the United States every year, with around 85% of it ending up in landfills. In celebration of Earth Day, R3eWaste and the Council provided free pickup of e-waste at Arizona companies. R3eWaste also provided free certificates of destruction indicating data erasure to celebrate AZTC TechTerra Month. There were no limits to the amount of electronics that companies can donate as part of the free program. Products that could not be refurbished or resold, R3eWaste ensured that the products were responsibly recycled.

For every pound of e-waste recycled, the Council donated 5 cents to the non-profit SciTech Institute. In addition, R3eWaste donated refurbished computers and laptops to not-for-profits or educational institutions.

# PREMIUM HEALTH CARE



## ASSOCIATION HEALTH PLAN WITH BLUE CROSS BLUE SHIELD OF ARIZONA

In an unprecedented move to provide quality health care coverage to member companies of all sizes in the state, the Arizona Technology Council announced in October 2019 the launch of its own Association Health Plan (AHP) in partnership with Blue Cross Blue Shield of Arizona.

The ability to offer AHPs to members followed the Council's support of SB1085, which passed the Arizona Legislature in May 2019. The Council's Public Policy Committee rallied the business and technology community to support the bill introduced by Sen. Kate Brophy McGee. The new legislation will enable Arizonans to obtain quality and affordable health coverage by providing a new pathway for employer groups and associations to offer fully insured and self-insured AHPs.

The plan offers a comprehensive product bundle that includes medical, dental, vision and life insurance; employee assistance; and health savings account (HSA)/flexible spending account (FSA) administration. It provides members with relief from COBRA administration, bill paying, compliance filings, and managing participant eligibility and benefits enrollment.

The Council's AHP targets member employers with fewer than 100 employees. The lower costs of health insurance will lead participating small businesses and startups to provide more generous overall compensation packages to their employees, a critical factor in helping technology companies attract and retain top talent.

### Advantages of the program:

- Access: Statewide network, including the Mayo Clinic, with exclusive network options in Maricopa and Pima counties
- Choice: A wide selection of primary care providers and specialists
- Service: Local customer service for care and claims support
- Flexibility: Coverage available for businesses with as few as two employees
- Telehealth: Employees can visit with a doctor, counselor or psychiatrist any day, anytime, anywhere—from their smartphone, computer or tablet.
- Tools and resources: Available to help members make educated decisions about their health care choices. Members can shop and compare costs for more than 1,600 procedures, find a doctor or speak to nurse on call 24/7, access health plan information via mobile app, and much more.

For more information on the Council's new AHP, visit [www.aztechcouncil.org/AHP](http://www.aztechcouncil.org/AHP).



# MULTIPLE EMPLOYER 401(K) PLAN

The Arizona Technology Council partners with UBS Financial Services, Inc. and Slavic401K to provide member companies a unique way to leverage the buying power of the Council by participating in a Multiple Employer (MEP) 401(k) plan. Endorsed nationally by TECNA (Technology Councils of North America), MEP significantly lowers the costs of a 401(k) plan, eliminates much of the administrative burden for a company, and provides the most comprehensive fiduciary protection allowed by the Department of Labor. Investment committee meetings, 5500s and audits are eliminated for each adopting company, and members are still able to customize their plan design and the retirement benefits they offer their employees.

## See the facts:

- MEP started in 2014
- 17 participating employers
- \$19 million in plan assets
- 720 eligible participants

To learn more about how this plan can help improve your employee benefits program and reduce costs, time and fiduciary responsibility, contact the Council's endorsed retirement plan partner, Michael J. DiGrazia.



## Michael J. DiGrazia

CFP®, CIMA® Institutional Consultant  
Portfolio Manager  
Senior Retirement Plan Consultant  
UBS Institutional Consulting Group

UBS Financial Services, Inc.  
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Phoenix, AZ 85016

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[www.ubs.com/team/southwest](http://www.ubs.com/team/southwest)



# STANDING COMMITTEES

- Additive Manufacturing Committee
- Ambassador Committee (Phoenix)
- Ambassador Committee (Tucson)
- Cybersecurity Committee
- IoT + Smart City Committee
- Law + Technology Committee
- MarTech Committee
- MedTech Committee
- Optics Valley Committee
- Preferred Business Partners Committee
- Public Policy Committee
- Tech Inclusion Forum (Phoenix)
- Women in the Workforce Committee (Tucson)
- Workforce Development + Education Committee

## Additive Manufacturing Committee

The Additive Manufacturing (AM) Committee serves as a forum for local participants in the AM community to educate, collaborate and promote this technology. Additionally, this Committee serves as a rallying point for large and small businesses to influence national certification and standards organizations, ensuring pending regulation and legislation is appropriate and achievable, and promotes the growth of AM technologies within Arizona. The Committee was co-chaired by Steven Szymeczek, co-owner of Penumbra Engineering who coordinates Tucson-area activities. Justin Smart, account manager at Interlink Engineering, was selected Committee co-chair in 2019 to coordinate activities in Phoenix. Staff Liaison is Ron Schott, Arizona Technology Council Executive Emeritus. The AM Committee hosts a general session every other month.

## Ambassador Committee (Phoenix)

The Phoenix Ambassador Committee is one of the longer operating committees of the Council. Participants are from companies of all sizes and every aspect of the technology industry. The Committee's overall goal is to provide added outreach to member services by fostering peer-to-peer relationships between new members and members' representatives and facilitating networking opportunities and strengthening member retention. The Committee was chaired by Stephanie Barnhart, vice president and commercial relationship manager at First Internet Bank. The Ambassador Committee led the management of the 2019 Tech the Halls year-end event with raffle proceeds benefitting STEM organizations within Arizona.

## Ambassador Committee (Tucson)

Members of the Tucson Ambassador Committee serve as advocates for technology innovation and boosters of the Council. Meeting monthly on the second Tuesday, the Tucson Ambassador Committee was led by Chair Nancy Roth, Principal, Blue Canoe Marketing, and staffed by Jeff Sales, executive director of the Council's Southern Arizona Regional Office.

## Cybersecurity Committee

The Cybersecurity Committee enables members to learn about cyber threats and the means of providing protection by serving as a platform to share best practices. The Committee was co-chaired by Phillip Guttilla and Ashley Gleckler, attorneys with Polsinelli PC, with staff support from Council Executive Emeritus Ron Schott. In 2019, the Committee planned and executed its annual Cybersecurity Summit. The Council's Law + Technology Committee also partnered on this event, covering both the legal and technology aspects of various cybersecurity topics such as risk categories, workforce and management strategies, the Internet of Things, and other cybersecurity trends. The committee also conducted its annual Cybersecurity Luncheon in December 2019 at ASU SkySong, which featured blockchain, the security around this cryptocurrency technology, and its data-privacy implications.



### **IoT + Smart City Committee**

The mission of the Internet of Things (IoT) Committee is to provide a platform for people to learn, collaborate, advocate and disseminate information about how IoT can help organizations create real-time business solutions in a sensor-enabled, analytics-driven world. The Committee was comprised of 25 active members and co-chaired by Christopher Ross, corporate social responsibility manager at Intel, and Kirk Busch, CEO of BigData Southwest and chairman of AzSTEM. Deborah Zack, the Council's senior director of membership services, was the staff liaison. In 2019, the Committee held four meetings that featured speakers from across the IoT technology stack, as well as facilitated the selection of keynotes and panelists for the Council's Smart Cities and IoT Summit.

### **Law + Technology Committee**

The Law + Technology Committee provides relevant information regarding the legal developments that affect member companies. The Committee focuses on leading issues arising from the intersection of technology and the law and provides a forum for practical and informative discussions designed to be of interest to technology and business professionals, as well as legal professionals. The Committee was chaired by Fredric Bellamy, a partner at Carpenter, Hazlewood, Delgado & Bolen, and supported by staff liaison Council Executive Emeritus Ron Schott. In 2019, the Committee partnered with the Council's Cybersecurity Committee for the Annual Cybersecurity Luncheon, which featured keynote speakers and a panel discussion with business and government leaders addressing the implications of recent changes in data privacy law, including the California Consumer Privacy Act that went into effect in 2020. The Committee also facilitated a lunch event regarding current trends in cybersecurity insurance.

### **MarTech Committee**

The MarTech Committee is geared to help professionals make the most of their marketing technology and to help companies execute their marketing and business strategy with data-driven decision-making. The 2019 co-chairs were Michael Lane, principal consultant of Point B, and Sheila Kloefkorn, president and CEO of KEO Marketing. The Committee met every other month to share best practices and perspectives on the multitude of business technologies and marketing tools available ranging from social media management platforms and PR tools that elevate your brand to sophisticated tools with AI and predictive analytics. Meetings in 2019 featured such topics as customer data analytics, B2B marketing, the state of AI in CRM, and strategies to launch and scale outbound lead-gen campaigns. In late 2019, the MarTech Committee brought on Susanne Lake, CEO and founder of Slake Consulting, as a new co-chair. Staff liaison is Jill Brownley, director of marketing + communications.

## STANDING COMMITTEES (CONT)

### MedTech Committee

Created to bring together executive and product design teams from medical devices and software, health and bioscience, telemedicine, and healthcare delivery, the MedTech Committee meets monthly to share best practices and peer-to-peer networking to accelerate individual and collective growth. The 2019 Committee chair positions were held by Sean Gunderson, co-founder of iTether Technologies; James Bates, CEO, chairman & founder of AdviNOW Medical; and Robert Yao, CEO & founder of EpiFinder Inc. The MedTech Committee defines the theme and selects the keynote speakers and panelists for the Council's annual MedTech Conference. In 2019, the MedTech Conference welcomed more than 200 registrants, with keynote presentations from Rick Hall, senior director of health innovation at ASU, and Heidi Dohse, senior program manager at GoogleHealth, and expert panelists from EpiFinder, Kadima Ventures, Catalytic Health Partners, Aesthetics BioMedical, CoupleyFit, AdviNOW Medical, GlobalMed, CyberMed Commission, Maricopa Integrated Health System, and VIDYO Healthcare Solutions. Staff liaison is Deborah Zack, senior membership director.

### Optics Valley Committee

The extremely active Optics Valley Committee has assumed leadership within the optics community statewide to coordinate education, promote innovation, and market the region's products and technologies. Meeting bimonthly, its members promote the advancement of optics and photonics worldwide. These technologies are integral to a vast array of products ranging from cell phones to medical diagnostics. Committee co-chairs John Dennis and Jack Schumann travel internationally on behalf of the optics industry in Arizona, as well as work with the Arizona Commerce Authority to showcase member products on the exhibit floor at Photonics West, the most important optics and photonics gathering in the nation. The Arizona Optics Pavilion is the centerpiece of their effort. In addition, the Committee partnered with the BIO5 Institute at The University of Arizona in 2019 to host the second annual Arizona Photonics Days—two days of technical discussions, business-to-business meetings, and networking to discuss global optics and photonics issues with peers and leaders in the industry. Staff liaison is Jeff Sales, executive director, Southern Arizona Regional Office.

### Preferred Business Partners Committee

The Council's Preferred Business Partners Committee was guided by Chair Jessica Loomis of Infinity Business Partners. Committee participation in 2019 garnered 12 member companies offering discounted services to Council members, cross collaboration and cross selling where mutual clients exist. The goals of the Committee are aimed at providing essential services required for business compliance, reducing cost, recouping time and providing peace of mind.

The 2019 Committee members included:

- Full-service printing capabilities by AZ Litho
- Ewaste recycling, disposal and destruction by R3eWaste
- Business advisory and accounting by Moss Adams
- Payroll and human capital management services by iSolved
- Human resource employee development and compliance management by jdhlinsights
- Employee health benefit plans by Banner | Aetna
- Incentive and tax credit analysis and filing solutions by HighPeak Advisors
- Commercial liability and risk management by Infinity Insurance Partners
- Retirement plan and administration by UBS Financial/Slavic401k
- Telephony and office communication systems by Pacific Office Automation
- Web design and media consulting by Nuanced Media
- Sales skills and customer services & negotiation by Sandler Training

### Public Policy Committee

The Public Policy Committee supports the Council by advocating for technology issues at the local, state and federal levels. The Committee works with Public Policy Partners (P<sup>3</sup>) to monitor the impact that legislation has on the health and growth of Arizona's technology industry. Jason Bagley at Intel served as the committee chair and was supported by Council President + CEO Steven G. Zylstra and Executive Emeritus Ron Schott.

The Public Policy Committee's top priorities for 2019 were:

- Restore the fourth-year funding for career and technical education.
- Appropriately fund the state's education system, including pre-K, K-12, joint technical education districts, career and technical education, and post-secondary education.
- Make changes to the Refundable R&D Tax Credit that make it accessible to more small businesses.



### Tech Inclusion Forum (Phoenix)

The Tech Inclusion Forum quarterly series focuses on highlighting the inclusion, diversity, equity and awareness (IDEA) challenges facing women and minorities in STEM fields today and showcasing the many extraordinary and accomplished women in Arizona's tech ecosystem. Led by Chair Diane Smigel, president and CEO of Palladium IT Advisors, and Council liaison Deborah Zack, senior director of membership services, the committee facilitated three major events in 2019. The first event, hosted and presented by McKesson, featured a fireside chat with Kathy McElligott, executive vice president, CIO and CTO at McKesson. The second event, "Building Diversity and Nurturing Inclusion," featured diversity expert and national speaker Deb Manning, PhD. The third event featured the diversity and inclusion journey of four Arizona companies: Avnet, Benchmark, MST Solutions and Qwick.

### Women in the Workforce (Tucson)

The year 2019 was a terrific year for Tucson's Women in the Workforce group. The Committee held three events addressing the work/life cycle of a career path from early-career to C-level. The focus was on women in industry, with emphasis on career stages, working in a primarily male environment and work/life balance. These topics were explored through panel discussions and one-on-one interviews. Staff liaison is Jamie Neilson, director of operations, Southern Arizona Regional Office.

### Workforce Development + Education Committee

The Council remains committed to helping develop and support a robust, aligned education and workforce development ecosystem in Arizona. The Committee was led by co-chairs Cathleen Barton, founder of Cathleen Barton Consulting, and Molly Castelazo, founder of Castelazo Content, and is supported by Council Executive Emeritus Ron Schott and President + CEO Steven G. Zylstra. In 2019, the Committee collaborated with the Council's Cybersecurity Committee and the SciTech Institute to promote the aim of educating and building Arizona's technology workforce.



# FUNCTIONAL COMMITTEES

## Finance Committee

The Arizona Technology Council's Finance Committee monitors the financial activities of the Council and lends guidance when necessary. In addition to Council President + CEO Steven G. Zylstra, members included Michael Guggemos, chief information officer, Insight Enterprises; Robert Rasmussen, director, technology strategy, Honeywell; Eric Lewis, partner, EY; Greg Kertman, vice president, relationship manager, Alliance Bank of Arizona; Jerry Proctor, president, JVP Strategic Consulting, LLP; and Leland Snook, director, Arizona Public Service. The Committee meets monthly and lends its expertise to the economic health of the Council.

## Executive Committee

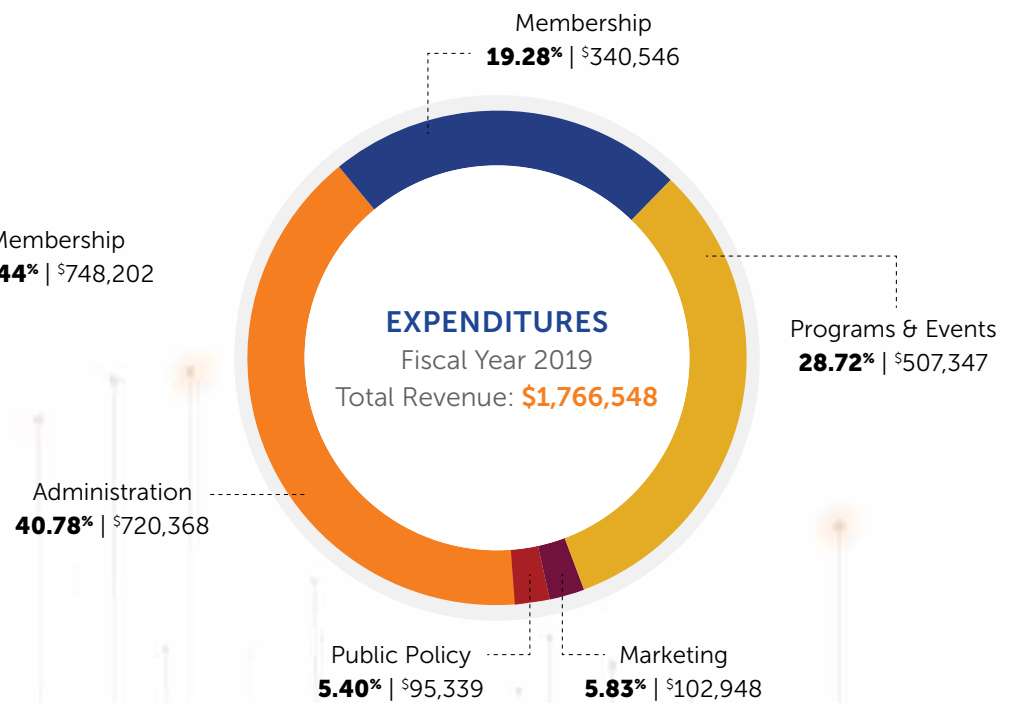
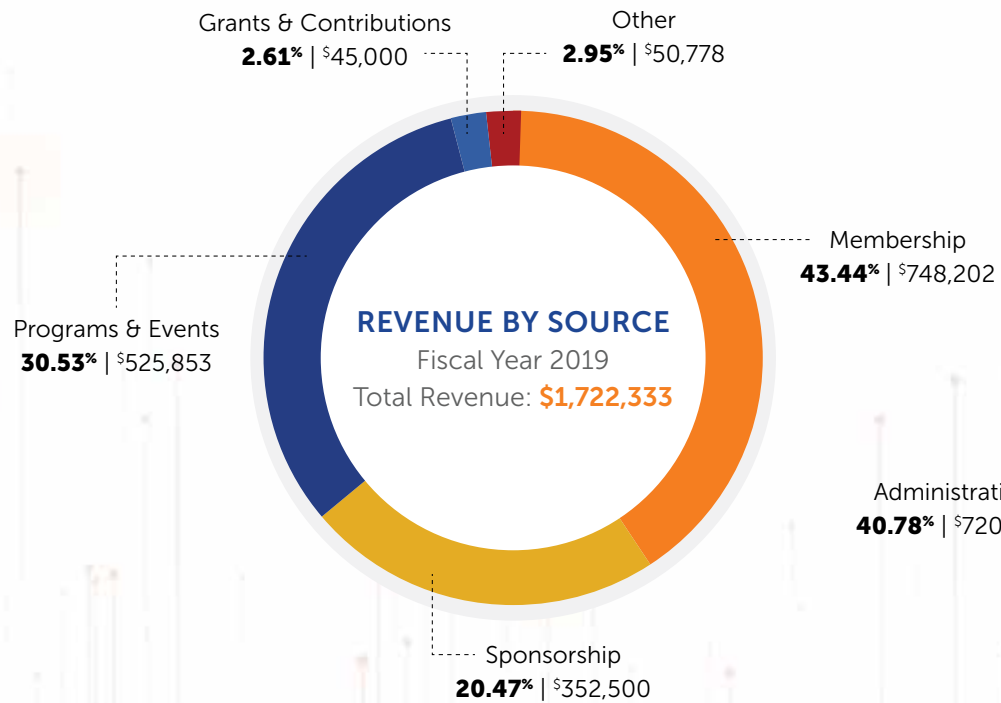
Convening the week before scheduled quarterly board meetings, the Executive Committee of the Council helps to shape the content of the board meetings. The members of the Committee during 2019 were Michael Guggemos, chief information officer, Insight Enterprises; Jacque N. Westling, partner, Quarles & Brady; Eric Lewis, partner, EY; David Tuhy, general manager, NSG Software Division, Intel; Michael Hawksworth, president, MSS Business Transformation Advisory; Alex J. Iuorio, senior vice president, supplier marketing and business development, Avnet; Chad Fogg, operations & logistics manager, Uber Technologies; Eric Miller, principal and co-owner, PADT, Inc.; Kerri Zunkowski, chief people officer, KEAP; and Rebecca Clyde, CEO and co-founder, Botco.ai. Emeritus executive committee members included Mark Goldstein, president, International Research Center; Dan Mazzola, clinical assistant professor, information systems, W.P. Carey School of Business, Arizona State University; and Robert Witwer, retired, Aerospace Advanced Technology, Honeywell. Overall, the Executive Committee had strong attendance at every meeting. This team has both diversity of expertise and a strong dedication to seeing the Council move in a positive direction. They work together monitoring the Council's adherence to its mission.

## Investment Committee

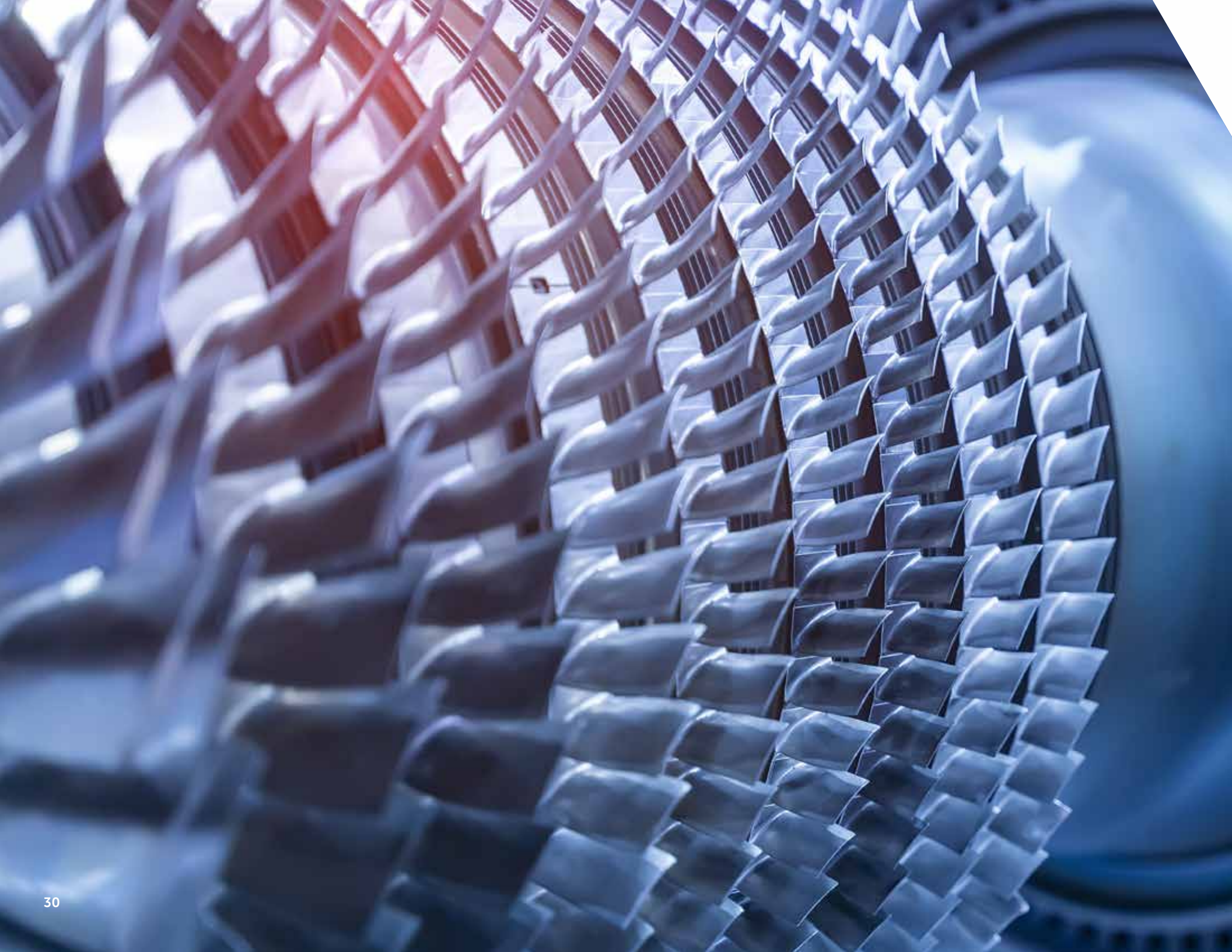
The Council's Investment Committee monitors the investments made available to the Council's Multiple Employer Plan (MEP) 401(k) program participants. With their guidance of the plan, the Council's 401(k) plan continued to increase participation during 2019. The members of the committee were Council President + CEO Steven G. Zylstra; Jack Trierweiler, controller (chairman), MSS Business Transformation Advisory; Jennifer Rojas, CEO, NextJen HR Consulting; David Brown Wilson, principal owner, DB Wilson LLC; and Debbie Hann, COO, Arizona Small Business Association. Additional advice and information regarding the investments comes from Michael DiGrazia and Thomas Tenney of UBS, and John Slavic and John Shultz of Slavic401k. The transition of the Council's MEP 401(k) funds in 2015 to Slavic401k has proven to be a very good choice as they have been very instrumental in fulfilling all the fiduciary and administrative responsibilities for the plan. There were 17 participating employers in the MEP 401(k) program as of the end of 2019 with \$19 million in plan assets.



# BY THE NUMBERS









# PEER GROUPS

## Aerospace & Defense CEO Network (Tucson)

In its 10th year, the 2019 Tucson CEO Network continued to bring senior business leaders together in a comfortable and confidential atmosphere to discuss business issues specific to member companies, their industry and the local economy as a whole. These executives drawn from an array of noncompetitive companies share valuable experience, insights and advice with other members of the group. Meetings are held on a rotating basis at member companies, where tours are conducted and best practices highlighted. In addition, speakers from government, academia and other industries make presentations to the group at their monthly meetings

### 2019 Tucson CEO Network Members:

Mary Bailey, Rincon Research  
Chris Bridgewater, Delta Development  
Shubhayu Chakraborty, CIS Global  
Paul DeHerrera, Innovative Avionics  
Jason Douglas, Tangent Aviation  
Carlos Fernandez, BF&S  
Andy Griffis, The Sensor Group  
Phil Guest, Securaplane Technologies  
Ryan Hartman, World View  
Dennis Kenman, Tucson Embedded Systems  
Patrick Marcus, Marcus Engineering  
James E. Millerd, 4D Technology  
Marilyn Speert, TMM Precision  
Doug Stetson, FreeFall Aerospace  
Howard N. Stewart, AGM Container Controls  
Austin Yamada, University Applied Research Corporation  
Darrel Yarbrough, Yarbrough Electronic Sales

### Ex Officio Member

Stephen Fleming, UA Research, Discovery, and Innovation (Advisor)

### Support

Jeff Sales, Arizona Technology Council, Executive Director, Tucson  
Roberta Miyashiro, Facilitator.

# STEM EDUCATION PROGRAMS



## Building a Stronger STEM Ecosystem

SciTech Institute, the partner and foundation of the Arizona Technology Council, works as a guiding catalyst to bring together technology-focused nonprofits, industry organizations and academic institutions to collaborate on strengthening the science, technology, engineering and mathematics (STEM) pipeline in Arizona. Led by Executive Director Dr. Jeremy Babendure, SciTech Institute accomplishes this by facilitating and funding initiatives that support STEM education, as well as developing and implementing programs that highlight a variety of STEM careers and awareness.

Dedicated to creating STEM engagements for everyone in the community, SciTech Institute is focused on cultivating an ecosystem of STEM communities through awareness, connections and empowerment. Due to the expansion of several of its educational programs beyond Arizona, SciTech Institute works in collaboration with the Arizona Commerce Authority and the Council to support STEM education across the region and throughout the world.

SciTech Institute encompasses some of the strongest STEM initiatives in Arizona, including the Arizona STEM Ecosystem, Arizona SciTech Festival, Rural Activation and Innovation Network (RAIN), Chief Science Officers program, Science for All, AZ STEM School Community of Practice, and the East Valley STEM Alliance. SciTech Institute also supports the Counting Bee™ and the annual Science Bowl for middle and high students.

## SciTech Institute Board of Directors

Robert Witwer | Chair, Honeywell (retired)

David Alberty | Treasurer, AFS Technologies

Lorenzo Chavez | Arizona State University

Angie Harmon | Freeport-McMoRan

Renee Levin | Intel

Diana McMahon | Salt River Project

Jeff Unruh | Alerion Capital Group LLC

Steven G. Zylstra | Arizona Technology Council and SciTech Institute

## Arizona STEM Ecosystem

Arizona is home to a flourishing STEM industry base, which is expected to grow significantly in the next decade. Therefore, it is imperative that Arizona fuel its talent pipeline to meet demands and position the state as a key economic leader. Since 2012, the Arizona SciTech Festival (ecosystem)—overseen by the SciTech Institute and founded by the Council, the Arizona Commerce Authority, Arizona Science Center, Arizona Board of Regents, Arizona State University and The University of Arizona—has built a collaborative network of over 900 organizations to promote STEM education and a diverse pipeline of qualified, skilled Arizonans entering higher educational institutions and the workforce. This network was officially recognized in 2015 as an inaugural member of the STEM Funders Network STEM Learning Ecosystems Initiative launched in Denver at the Clinton Global Initiative.

In December 2018, the U.S. National Science & Technology Council's (NSTC) Committee on STEM Education released a five-year STEM education strategic plan for the United States. The plan's vision is to create a future where all Americans will have lifelong access to high-quality STEM education and the United States will be the global leader in STEM literacy, innovation and employment. Among the objectives identified to achieve this vision is fostering STEM ecosystems as a pathway to meeting the plan's goals. In addition, Council President + CEO Steven G. Zylstra and Arizona Commerce Authority President and CEO Sandra Watson were selected by Gov. Doug Ducey to represent the state for the first state-federal STEM Summit at the White House.

In response to this plan, the SciTech Institute is developing a strategic roadmap for strengthening the state's ecosystem. The Institute is working with the Arizona Commerce Authority, Public Policy Partners and state legislators to ensure the Arizona STEM ecosystem embraces and embodies the objectives outlined throughout the NSTC Strategic Plan. The goal is to provide unique and unprecedented opportunities for enhancing and broadening STEM programming, encouraging federal investment in the state, engaging more rural communities, and better preparing underrepresented populations to fill the state's current and projected STEM jobs.

## Arizona SciTech Festival

The Arizona SciTech Festival is a statewide celebration of STEM held annually in February and March. Spearheaded by SciTech Institute in partnership with the Council, Arizona Commerce Authority, Arizona Science Center, Arizona Board of Regents, The University of Arizona and Arizona State University, the Arizona SciTech Festival leverages the Arizona STEM Ecosystem's organizations from industry, academia, arts, civic, K-12 and the community. Through festivals, expos, workshops, conversations, exhibitions, tours, and more throughout Arizona, the SciTech Festival excites and informs Arizonans of all ages on how STEM will drive our state for the next 100 years.

Promoting STEM education while highlighting its impacts in everyday life, the two-month initiative offers attendees myriad informal education opportunities aimed at building awareness and engagement, including hands-on experiences that provide a new perspective on the prevalence and importance of STEM. The goal is to inspire Arizonans of all ages to pursue related fields of study and STEM-related careers. In 2019, more than 900 collaborators—including schools, businesses and industry associations—worked together to facilitate over 3,000 STEM-based celebrations in more than 80 Arizona cities and towns. These events drew more than 560,000 attendees from across the state, including many rural and underserved populations.

## 2019 Arizona STEM & Innovation Summit

This statewide conference brings together Arizona's key stakeholders in business, industry, education, government and the community to share best practices from the field, experience the latest in Arizona innovation, build unique STEM networks, and discuss opportunities to improve public STEM awareness and workforce readiness. More than 1,000 attendees typically are drawn to this annual event, which encompasses more than 50 sessions, over 50 exhibitors, and hundreds of networking opportunities.

## Rural Activation and Innovation Network (RAIN)

Rounding out the last year of a four-year National Science Foundation Advancing Informal Science Learning grant, the Rural Activation and Innovation Network (RAIN) network continues to expand the SciTech Festival to Arizona's rural areas and enhance informal STEM programming and support. The four regions participating in RAIN—Cochise County (Southeastern Arizona), Graham and Greenlee counties (Eastern Arizona), the Verde Valley of Yavapai County (Central Arizona), and Southern Navajo and Apache counties (White Mountains/Navapache)—have shown that regional science festivals are an exceptional strategy for convening business, education, government and community stakeholders in STEM collaborations. RAIN is also vitally important to Arizona's comprehensive STEM ecosystem as it connects partners in rural Regional

Innovation Councils (RICs) with each other and statewide resources, such as the Council, Arizona Commerce Authority, Arizona State Parks, Local First Arizona, Arizona Science Center, Arizona State University, 4-H and Arizona libraries.

To facilitate engagement, RICs offer mini grants to local organizations and schools in support of informal STEM learning. To date, 27 mini grant projects serving more than 6,095 people have been funded. The Navapache RIC funded 48% of the projects, Graham-Greenlee and Verde Valley RICs each funded 19%, and Cochise County RIC funded 15%. Projects included participation and registration costs for an existing program, materials for use in a new program, materials for use in an existing program, materials not tied to a specific program, and the creation of a new program.

## NavApache RIC (NAIC)

Sitting in the northeast quadrant of Arizona, the NAIC team has turned out to be the early innovator of the RICs. It has an active and diverse representation of groups, including First Things First, regional chambers of commerce, regional libraries, a discovery learning center, aeronautical engineers, promotion specialists, cooperative extension agents, K-12 educators and community college outreach personnel. This team has broadened NAIC's reach and representation of the region. The NAIC has focused much of its effort in creating multi-generational STEM programs with local libraries and after-school programs for historically underserved areas of the region, including unincorporated settlements and the White Mountain Apache Tribe. Specifically, they have supported the Show Low Public Library, McNary Unified School District, Snowflake Junior High School, St. Johns High School, St. Anthony School, Northland Pioneer College, Boys and Girls Club of Round Valley, Jeagers Robotics Club, the Blue Ridge/University of Arizona 4-H Fab Lab, Experimental Aircraft Association (EAA) Chapter 1044, White Mountain Nature Center and the Navapache STEM Connection.

## Cochise County RIC (CCRIC)

The CCRIC has been a model for champions and distributed leadership. Since April 2018, the shared leadership team has built upon a solid foundation and shifted strategies to include different parts of the region. The team also reviewed and revised its strategic plan, shifting focus from primarily community engagement models like robotics and maker spaces to developing stronger, more meaningful relationships with regional community leaders and organizers who can lead community engagement. This includes supporting the Chiricahua Community Health Centers, Patterson Observatory through the University South Foundation, Copper Queen Library, and Willcox Historic Theater Preservation, Inc. through its mini grants.

## STEM EDUCATION PROGRAMS (CONT)

### Verde Valley RIC (VVRIC)

The smallest and most populated of the four regions, the VVRIC includes four towns, several unincorporated settlements and the Yavapai Apache Nation. Of the RICs, VVRIC pushed the hardest to stay relevant in the face of structural and political challenges. The VVRIC has successfully extended its network and engagement in the region and forged new partnerships with Sedona and Cottonwood economic development councils. The VVRIC also collaborated with Local First Arizona on its rural STEM business outreach program, Science Happens Here, engaging Yavapai College and the Verde Valley SciTech planning team to create a regional STEM festival. The VVRIC has been successful in getting the word out through local TV, radio and newspaper articles, and leveraging three TV interviews with radio simulcasts to reach more than 4,000 people. To date, VVRIC has supported the Verde River Institute, West Sedona School, Camp Verde Dark Sky Committee and the Local First Arizona Foundation.

### Graham/Greenlee RIC (GGRIC)

For the first 18 months, the GGRIC was championed by a lifelong resident and dean of the local community college district. In May 2018, the director of the Graham County Library took on a more active role in the GGRIC. This led to a partnership with the high school science teacher from the remote town of Duncan (pop. 800) and the anatomy teacher from Eastern Arizona College to redirect the RIC's efforts. In July 2018, these four professionals led the GGRIC in a strategic plan revision to grow their regional network and help target underserved populations and siloed organizations in the region. The GGRIC has leveraged this plan and its mini grant program to support the Duncan High School STEM Club; Eastern Arizona College, Boys Scouts of America, Coronado District; Eastern Arizona Science (STEM) Initiative; and the Safford City Graham County Library.

Another important development was a National Science Foundation Advancing Informal STEM Learning supplement awarded to SciTech Institute to bridge the RAIN and Chief Science Officers (CSO) initiatives. This funding supports the development of a CSO cabinet in Cochise County and integration of CSOs into the Cochise RIC. The RIC members see students as important stakeholders in their regional STEM ecosystems and as a way to increase their stakeholder base and connection with the public. As a result, NSF funding has been leveraged to raise an additional \$45,000 to support the rollout of a CSO cabinet in the Verde Valley RIC as well.

### Chief Science Officers Initiative

A key goal of the CSO program is to place youth squarely in the center of STEM promotion, experience and community action, ultimately strengthening the 21st century STEM workforce. The program is modeled after student government with students in grades 6-12 who are elected by their peers. CSOs champion the interest, engagement and communication of STEM and innovation on and off campus. Basic programming includes leadership training and planning STEM engagement opportunities to ensure they reflect their peers' interests. CSOs also streamline schools' connection to local scientists, STEM professionals and organizations, working with these entities to offer their peers and community members hands-on experiences that build STEM awareness and workforce skills. Collaboratively, CSOs function as a unified cabinet, engaging in local, state and national STEM conversations to change the perception of STEM (or STEAM when the arts are included), transform school and community culture, and broaden participation for all students and community members.

Since its inception, the program has experienced significant growth at the state, national and international levels with 797 CSOs engaged in 2019-2020. The Arizona cohort consists of 288 CSOs from 124 schools. The remaining CSOs span the globe in Kenya, Mexico and Kuwait, as well as cohorts in Atlanta; the Saginaw Bay area of Michigan; five regional hubs across Oregon; San Antonio and Houston, Texas; western New York; Philadelphia; Northeast Florida; and Delaware.

Organizations and companies supporting and advocating for the CSO program and STEM education include the Council; the Arizona Commerce Authority; AccountabillIT; APS; Arizona Board of Regents; Arizona Community Foundation; Arizona Parenting; Arizona Renaissance Festival; Arizona Science Center; Arizona State University; Bear Essential News for Kids; Cisco; Cox Communications; Fennemore Craig; Freeport McMoRan; Footprint; Goodwill; Green Living Magazine; idloom; Intel; iFly; MAC6; Midwestern University; ON Semiconductor; PADT; Phoenix Business Journal; State Farm Insurance; Southwest Airlines; SRP; Tallo; The University of Arizona; University of Advancing Technology; Univision Contino; USAA; Verizon Foundation; Viasat, Inc.; and Zovio. In addition, the National Science Foundation has provided generous support that has enabled SciTech Institute to refine the CSO program's structure and curriculum, implement mentor training and teacher professional development, and develop standards of practice and other guides.



## Science For All, LLC

Science For All is a 501(c)(3) Arizona-certified, qualifying charitable organization that utilizes the innovative CSO program as a vehicle to support the engagement of underrepresented, underserved youth to develop employability and technical skills through STEM events, job training programs, mentorships, internships and other STEM activities. This next generation of STEM professionals, science educators and leaders will drive innovation, solve problems and create technology never imagined previously. Most importantly, Science For All does not compete with the public or private school tax credit, the foster care tax credit or the Arizona Military Family Relief Fund. To learn more about Science For All, visit <https://scitechinstitute.org/programs/science-for-all>.

## Counting Bee

The National Counting Bee™ is an annual, fast-paced and exciting competition in which contestants are asked to calculate a broad selection of skip-counting patterns with a varying degree of difficulty. The competition is open to K-12 students at all public, private, charter and home schools. Created by Scott Flansburg, The Human Calculator® (a nickname given to him by television personality Regis Philbin), the Counting Bee's mission is to help students improve basic arithmetic skills and promote numeracy.

Teachers register their students and run a school-based competition to identify top-scoring contestants for the national competition. Competitions include a 15-second countdown in which "mathletes" race to compute as many numeric answers in a level. For each level, participants are given a random starting number then directed to count by a fixed number. A minimum of seven correct answers is needed to proceed to the next level.

## Arizona Science Bowls

The Arizona Middle and High School Science Bowls are regional Jeopardy-style competitions focused on STEM topics. The events are open to all Arizona and Nevada middle and high school teams and are held at the ASU West Campus in partnership with ASU's New College of Interdisciplinary Arts and Sciences, and the School of Mathematical and Natural Science. The competitions, nationally facilitated by the U.S. Department of Energy, draw over 14,000 students each year. Regional winners go on to compete at the national event in Washington, D.C. Over the last decade, Arizona Science Bowl events have reached thousands of students and successfully promoted excellence in STEM education while furthering the cause to build a world-class workforce in Arizona. Solugenix is the sponsor of these events.

### 2019 Arizona Middle School Science Bowl Winner:

The Davidson Academy of Nevada, Reno

### 2019 Arizona High School Science Bowl Winner:

BASIS Chandler, Chandler





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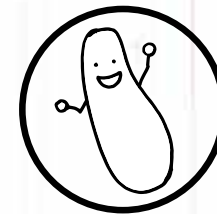
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