



ARIZONA
TECHNOLOGY
COUNCIL
a place to connect and grow

ANNUAL REPORT

RESILIENCY

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LETTER FROM THE PRESIDENT + CEO

Who would argue the point that the year 2020 was not memorable?

Unfortunately, the memories of many would center on all that changed the world for the worse. Yes, dealing with the impact of pandemic—whether it affected you on a personal level or as a member of your community—was a true test of our fortitude. It was hard not to focus on the fact that life as we knew it was not the same. Would it ever be?

Then it happened. We collectively realized that these sudden changes were not to be considered the same as the end of time. Yes, masks and social distancing became common. We ventured past our driveways only when essential. And many dealt with flu-like symptoms while some took a turn for the worse. But overall, life went on.

Once the fears of the unknown lessened, we began to realize we were more resilient than we had first thought. Many of us recalled those stories of how tough our grandparents were and appreciated this trait must have been passed on to us and everyone else living within “our bubbles.”

All along, many were able to continue the one habit that gave us a true sense of normalcy. I’m talking about getting to work. The technology community definitely was no exception as “Zooming” quickly became a recognized verb. Businesses, schools and families were able to connect with one

another. We learned, we shopped, we joined virtual communities—we stayed connected!

While that was happening in front of the screens, people working behind the scenes and screens didn’t seem to miss a beat on giving the world what it needed.

Of course, targeting COVID-19 was on the agenda for many players in the state’s technology ecosystem who also are members of the Council. For example, the Arizona Genomic Union comprised of faculty from Arizona State University, Northern Arizona University and The University of Arizona, as well as the Translational Genomics Research Institute (TGen), were on the trail of SARS-CoV-2 to see how it evolved and spread. ASU’s Biodesign Institute was the source of a new saliva-based test while UArizona detected active cases on campus by testing wastewater from student housing. Also, UArizona graduated its Tucson and Phoenix medical students early to help staff hospitals sorely needing additional well-trained support.

Speaking of health care’s role in the fight, Sonora Quest Laboratories began providing access to an antibody test using blood specimens, as well as molecular diagnostic testing. To transport infected/suspected patients to and from life-sustaining



...people working behind the scenes and screens didn't seem to miss a beat on giving the world what it needed.

medical appointments, a new service featuring a specialized fleet of Phoenix-based drivers was launched by Veyo, the nation's only full-service, tech-enabled non-emergency medical transportation broker.

Beyond health care, others were laying the foundation for the future. From the transportation sector with Lucid Motors' electric vehicle factory taking shape in Casa Grande and Waymo widening its ride services to Arizona becoming home to the largest education technology sector in the nation as industry trailblazers pick our state for their headquarters, we continue to experience progress.

The Council itself also responded to the crisis. To help support the new way of doing business, we launched our microsite to share information on assistance and funding, tools and resources, job opportunities, and other relevant updates to help execute the various stimulus programs and navigate through the murky waters.

We also continued with our mission to keep members connected as our going virtual took hold. The Virtual Breakfast Speaker Series and Tech Sector Speaker Series brought together innovators, advocates and champions of existing and emerging sectors who are reshaping Arizona's technology

ecosystem. Even some of our long-standing events continued. They included our after5 Tech Networking, as well as the CEO Network for business executives and professionals in Tucson.

The Council also rolled out some new offerings. The platform AZTechBase was launched in conjunction with the Arizona Commerce Authority and IT services firm AccountabillIT. Originally designed to provide information about who we are as an industry, the goal of AZTechBase is to further elevate Arizona's technology ecosystem by providing accurate, current datasets that are easily accessible. But even more important is the platform became a way to help support communication and interaction that had been limited in the midst of the pandemic.

In 2020, the Council launched AZTechCast, a live monthly podcast on Phoenix Business RadioX to showcase leaders having real conversations about what's happening in the technology sector across the state. Hosts and guests on AZTechCast share success stories, news, trends and analysis about leading startups, companies and emerging technologies. And in collaboration with Tucson-based firm Michael Beach Consulting, the Council's TechFocus Member Spotlight podcast features innovative entrepreneurs, transformative

leaders and tech titans who are reshaping the state's evolving tech ecosystem in existing and emerging sectors.

Our quarterly Arizona Technology Industry Impact Report was revamped by adding video interviews with technology leaders across our major technology sectors. Of course, the report continued to focus on the industry's growth.

The Council also partnered with The Western Way to release a report detailing how policymakers can incorporate energy innovation into Arizona's plan for recovering from the economic downturn caused by the pandemic. "Innovation and Clean Energy Industry Recommendations for Economic Recovery: Policy Options from Arizona's Business Community" outlines specific benefits to policymakers for their recovery plan roadmap.

On another front, the Council added enhancements to our Association Health Plan and 401(k) Multiple Employer Plan. Our members indeed are experiencing the power of pulling together in this critical time.

We embraced the fact that we really are in this together. It wasn't just a slogan with a one-minute shelf life. What we've heard frequently throughout the Council's virtual roundtables is that some people have built bonds that will survive for decades. Resiliency is at home in Arizona.

Steven G. Zylstra
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.

The background of the slide is an abstract composition of light streaks in shades of blue, orange, and white, creating a sense of motion and energy. The streaks are blurred and radiate from various points, giving the impression of light trails from a fast-moving object or a dynamic digital environment.

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 Priorities

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 that impacts the sustainability and growth of Arizona's technology ecosystem. Through the collective strength of its members, the Council informs and educates policymakers on issues 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.

In 2020, the Council, its Public Policy Committee and government relations firm Public Policy Partners (P3) relied heavily on the Council's mission by preparing key ideas, goals and legislative initiatives to:

- Improve the business climate for technology-based companies
- Provide sources of risk capital that encourage entrepreneurship
- Create an environment that supports science- and technology-related job retention and creation
- Attract, train, retrain and retain the talent required to compete in a global innovation economy

2020 legislative priorities focused on:

- Ensuring proven economic development programs such as the Angel Investment Tax Credit and current

levels of the Research and Development Tax Credit are reauthorized past their sunset dates in 2021.

- Obtaining state support of \$3 million annually for five years to cultivate a statewide STEM ecosystem by:
 - Focusing on long-term, shared, sustainable and flexible STEM missions that bridge, integrate and strengthen learning opportunities across sectors instead of isolated, independent entities.
 - Expanding STEM business and education opportunities throughout rural and urban communities to fuel a strong, diverse talent pipeline prepared to meet the state's anticipated growth.
- Consistently and sustainably funding the state's education system, including pre-K, K-12, career and technical education (CTE), equitable access to dual enrollment, and postsecondary programs.
- Supporting Arizona tax system improvements to strengthen competitiveness, fairness and predictability, specially establishing statutory clarification on taxation of digital goods and services.

The Council continued its advocacy for clean and renewable energy in 2020. As the region gets closer to becoming a major tech hub, it's important for Arizona to embrace clean energy technologies with a lower environmental impact, provide energy security for existing businesses and technology startups, increase energy independence, and help drive economic development. The Council continued to recommend ways to develop the state's energy policy for the future, including:

- Nuclear energy – Continue utilization of the low-cost base load power of the Palo Verde Generating Station to

benefit the state's residents and businesses.

- Renewable energy – Seek ways to attract economic investment that takes advantage of the state's world-class solar energy attributes and other forms of renewable energy resources.
- Electric transmission – Create and maintain a robust transportation electrification market and electric vehicle charging infrastructure as Arizona continues to foster innovation and grows into a world-class tech hub.
- Energy planning – Adopt a robust regional approach to energy development. Arizona has a tremendous opportunity to prosper through this type of cooperation.
- Storage technology – Look for opportunities to explore storage technology to be a significant companion to renewable energy.

Additionally, the Council and key member stakeholders collaborated to encourage the Arizona Corporation Commission (ACC) to increase the Renewable Energy Standard & Tariff (REST) to reflect technology advances and new market realities. In October 2020, the ACC approved a plan for utilities to acquire all of their energy from carbon-free sources by 2050, bringing Arizona closer in line to other Western states. The new regulations require electric utilities to get half their power from renewable energy by 2035. In addition, electric utilities will need to supply customer demand for electricity with renewables, carbon-free nuclear or energy-efficiency measures by 2050.

Sustainably funding the state's education system including pre-K, K-12, JTED, CTE and postsecondary education in 2020 was one of the Council's top legislative priorities.

One of the most significant issues of the 2020 session was education funding and increasing teachers' pay. In March 2020, Gov. Doug Ducey signed a bipartisan state budget agreement that included \$175 million for the third installment of the 20x2020 teacher pay raise plan. In total, Arizona has added \$645.2 million for Arizona's public-school teachers as part of the 20x2020 initiative, resulting in permanent funding for a 20% increase in average teacher pay. In addition, \$67 million was allocated to accelerated flexible funding for things such as technology, textbooks, building renewal and personnel.

Legislation strongly supported by the Council in 2020 and signed by the governor included:

- **HB 2771 – Tax Credits, Qualified Facilities, Extension:** This bill extends the sunset dates for several economic development programs. The termination date for income tax credits for expanding or locating a qualified facility in Arizona is extended eight years to December 31, 2030, with the deadline for preapproval by the Arizona Commerce Authority (ACA) extended to January 1, 2031. The deadline for completion of the minimum investment to qualify for the income tax credit for investment in new renewable energy facilities is extended 12 years to December 31, 2030. Beginning with a credit claimed for tax year 2022, the amount of the credit for increased research activities not used to offset taxes may be carried forward for up to 10 consecutive taxable years, decreased from 15 consecutive taxable years. The sunset date for the Research and Development tax credit was extended an additional 10 years. (Primary sponsor: Rep. Ben Toma)

Below are other key pieces of legislation that P3 actively worked or monitored on behalf of the Council. A majority of the bills introduced in 2020 were unsuccessful as a result of the Legislature halting normal business due to the pandemic to specifically focus on a skinny budget and

other necessary legislation to ensure schools were able to operate in the environment, public health and public safety issues.

- **HB 2409/SB 1243 – Small Business Investment Credit; Extension:** These bills extend the termination date for the income tax credit for a qualified investment in a qualified business for an additional 10 years to June 30, 2031. Commonly called the Angel Investment tax credit program, it has been instrumental in Arizona's startup ecosystem. It was one of the Council's top legislative priorities. Both the House and Senate bill were ready to be voted on by the entire chamber. However, it did not make it prior to the shutdown.
- **HB 2152 – Appropriation; STEM; Learning; Workforce Development:** This bill appropriates \$3 million from the general fund in FY2020-21 to the ACA to administer a grant program to cultivate STEM learning and STEM workforce development opportunities in Arizona. The Legislature intends that the appropriation be considered ongoing funding in future years. By December 31, 2020, the ACA was required to report to the Legislature on distribution of monies. P3 had the bill posed to make it into the budget and was scheduled to be heard in the Senate Appropriations committee. However, that hearing was canceled due to the Legislature halting normal business. Due to the unknown financial impacts of the pandemic, the Legislature determined they were not going to be advancing any legislation with new financial impacts that were not directly related to COVID. (Primary sponsor: Rep. Michelle Udall)
- **HB 2706 – Interscholastic Athletics; Biological Sex:** This bill stipulated that an interscholastic or intramural athletic team or sport sponsored by an educational institution in Arizona is required to be designated as one of the following based on biological sex: males,

men or boys; females, women or girls; and coed or mixed sex. Athletic teams or sports designated for females, women or girls cannot be open to students of the male sex. If disputed, a student may present a physician's statement indicating the student's sex is based on an analysis of genetic makeup. Any student who is deprived of an athletic opportunity, suffers any direct or indirect harm as a result of a violation, or is subjected to retaliation for reporting a violation has a cause of action against the educational institution or athletic association. The Council opposed this bill and P3 worked to educate legislators regarding their concerns. The bill passed out of the House after several Republicans voted it out. The Senate did not have the necessary votes due to three Republicans being opposed along with the entire Democratic caucus. Therefore, the bill was never assigned to committee. (Primary sponsor: Rep. Nancy Barto)

- **HB 2741/SB1403 – CTEDs; Fourth Year Funding; In-Demand Jobs:** These bills stipulated that students in grade 9 and students in the school year immediately following graduation who are enrolled in courses approved by the governing board of the Career Technical Education District (CTED), participating school districts or charter schools may be included in a CTED's student count. Funding cannot be provided for more than four years for the same student. Funding for a student in grade 9 is provided only if the student reaches the 40th day of grade 10, and at that time funding is provided for that student for grade 9 and any subsequent year in which the student is eligible for funding. Funding is provided to the CTED only if the student is enrolled in a approved CTE programs for high-demand career paths with median- to high-wage jobs in that region. This was a priority of the Council. As a result of the pandemic, the Legislature did not fund any new or expanded programs. (Primary sponsors: Rep. Michelle Udall and Sen. JD Mesnard)

PUBLIC POLICY + ADVOCACY CONTINUED

Legislative Priorities

■ **HB 2762 – Project Rocket Pilot Program;**

Appropriations: This bill establishes the Project Rocket Pilot Program to improve academic outcomes for students who meet eligibility requirements and help close the achievement gap for students of lower socioeconomic circumstances. Schools that received a letter grade of C during the prior fiscal year with at least 60% of enrolled students qualifying for free or reduced-price lunches, and schools that received a letter grade of D or F during the prior fiscal year will receive \$150 per student. Mentors will assist with academic achievement and will partner with independent improvement experts. School boards that qualified based on a grade of F are required to establish a Project Rocket Committee to submit the school improvement plan. Appropriates \$42.61 million from the general fund in each of FY2020-21, FY2021-22 and FY2022-23 to the Project Rocket Fund. This was one of Gov. Ducey's budget initiatives and the Council was supportive. This was planned to be in the budget prior to the Legislature shifting to a skinny budget. (Primary sponsor: Rep. Michelle Udall)

■ **SB 1166 – Appropriations; STEM Internships:**

The bill appropriates \$2 million from the general fund in FY2020-21 to the ACA for matching monies for educational stipends for high school, college and university students and for K-12 teachers in Arizona who participate in STEM internships. The ACA is required to establish guidelines and procedures for awarding the stipends. Some stipend requirements are specified, including maximum award amounts. The ACA is required to submit an annual report to the governor and the Legislature on the stipends and internships. The Council supported this initiative but it was not included in the

skinny-budget priorities. (Primary sponsor: Sen. Heather Carter)

■ **HB 2060 – Autonomous Vehicles; Safety Features;**

Prohibitions: This bill stipulated that a person is prohibited from overriding the safety features of a fully autonomous vehicle or partially autonomous vehicle by modifying the vehicle's computer program, mechanically modifying the vehicle, or placing any physical device, including a weight, on the vehicle's steering wheel. P3 worked with the sponsor and other stakeholders to ensure the bill was amended to not interfere with technological advancements in the industry but also accomplish the goals of the sponsor. The bill passed out of the House and went through the Senate Rules Committee. However, it did not receive a final vote in the Senate. (Primary sponsor: Rep. John Kavanagh)

■ **H2262 – Appropriations; Broadband Grants:** This bill appropriates \$5 million from the general fund in each of FY2020-21, FY2021-22 and FY2022-23 to ACA to provide broadband grants. P3 supported this legislation on behalf of the Council as it was one of the 2020 priorities. The measure failed to receive a vote by the entire House. This was an item that was a part of the budget negotiations prior to the Legislature having to adopt the skinny budget. (Primary sponsor: Rep. Diego Espinoza)



2020 STRATEGIC PLAN

Technology Collaboration

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, which made great progress in 2020. 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.

The pathways and their sponsors are:

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:

Identify and Address Member Needs

Michael Haworth, MSS Business Transformation Advisory

Initiative 7:

Build Image and Awareness of Arizona As A Destination for Tech Companies

Rebecca Clyde, Ideas Collide

In 2020, Initiative 5 led the way with the launch of www.AZTechBase.com, a comprehensive online database of technology companies, leaders, professionals and investors in Arizona. As a collaboration of three trusted technology voices—the Council, the Arizona Commerce Authority and IT services firm AccountabillIT—AZTechBase is a tremendous resource to learn more about Arizona's growing technology ecosystem.

initiatives 1 and 6 combined in 2020 to create a stronger team to continue elevating member engagement strategies. A comprehensive report was developed in collaboration with the leaders of the two initiatives for the Council's strategic planning teams to begin to put into motion actions focused on member engagement.

Initiative 2, led by PADT Inc. Co-founder and Principal Eric Miller, provided a final report to the members of the Council's board in 2020 with recommendations on how to grow both membership and revenue in the future.

SIGNATURE EVENTS

Ongoing Events



after5 Tech 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, each event in the 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. Due to COVID-19, the Council in 2020 was able to hold only one in-person after5 Tech Mixer hosted by IMNA Solutions at Perimeter83 on the campus of the University of Advancing Technology. The Council, in conjunction with PADT, Inc., transitioned to virtual after5 Tech Mixers for the remainder of 2020.

2020 Results:

Phoenix in-person events: **1**
Virtual events: **10**



VIP Tech Mixer Networking Events

Held in conjunction with the Council's quarterly board of directors meeting, the VIP Networking Events include attendees from the board, members and prospective members. Due to COVID-19, the only in-person VIP Tech Mixer in 2020 was at the Phoenix law offices of Fennemore Craig in January.

2020 Results:

Number of in-person events: **1**
Total attendance: **112**



Tech Speaker Series

The Council's monthly Tech Sector Speaker Series brings together technology leaders, outstanding CIOs and CTOs, advocates, innovators and industry champions of existing and emerging sectors who are reshaping Arizona's tech ecosystem. This expert panel forum advances Arizona's technology evolution and growing designation as a technology hub. With a diverse range of experience and backgrounds, these technology titans are leading the way and making a positive and lasting impact on Arizona's technology ecosystem. Topics covered in 2020 included STEM, blockchain, maintaining digital infrastructure, renewable energy, space technology, electric vehicles, artificial intelligence, machine learning, and strategies to survive technology disruption.

2020 Results:

Number of events: **8**
Total attendance: **407**



Breakfast Speaker Series

To keep constituents, businesses, startups and innovative entrepreneurs informed during a challenging and tumultuous year, the Council launched its Virtual Breakfast Speaker Series in early 2020. Experts across a wide array of industry sectors, as well as elected officials, shared their expertise and insight on timely topics, issues and opportunities. The engaging format permits time to network over breakfast, followed by an interactive discussion, and ending with a Q&A session. Topics covered included cybersecurity in today's new normal, advanced manufacturing, the impact of university research, grant opportunities and more. Featured guests included Phoenix Mayor Kate Gallego and Tucson Mayor Regina Romero.

2020 Results:

Number of events: **14**
Total attendance: **500**



Tech Inclusion Forum

The Tech Inclusion Forum quarterly series focuses on highlighting the inclusion, diversity, equity and awareness (IDEA) challenges facing women and minorities in STEM fields and showcasing the many extraordinary and accomplished professionals in Arizona's technology ecosystem. Led by Chair Diane Smigel, president and CEO of Palladium IT Advisors, and Council liaison Deborah Zack, vice president, membership services, the committee facilitated three major events in 2020. The January 2020 event featured a panel of female technology leaders from Ticketmaster. The June 2020 event featured Intel Corporation's Director of Global Diversity Reuben Miller. The September 2020 event "Understanding Racism: Historical Context and Call to Action" featured accomplished HR executives Patricia Davis and TJ Lowery who provided an educational and provocative baseline for better understanding the quest for ending systemic racism and moving towards racial equality.

2020 Results:

Number of events: **3**
Total attendance: **247**



Women in the Workforce

A female-focused event series, the Women in the Workforce group facilitates quarterly learning and mentoring opportunities in Southern Arizona in technology, career development, leadership, as well as help to promote careers in technology for women. In 2020, the Committee planned and executed three events addressing the progressive stages of a career path from early-career to C-level, the challenges and opportunities of working in a primarily male environment, and strategies to achieve better work-life balance. These topics were explored through featured speakers, panel discussions and one-on-one interviews. Staff liaison is Jamie Neilson, director of operations, Southern Arizona Regional Office.

2020 Results:

Number of events: **3**
Total attendance: **221**



Tech Podcast Series

AZTechCast, the podcast of the Council, is dedicated to covering innovation and technology in Arizona and beyond. Co-hosted by Phoenix Business RadioX and Arizona Technology Council President & CEO Steven G. Zylstra, AZTechCast's guests share success stories, news and analysis about the region's leading startups, companies and emerging technologies, as well as the latest industry trends and critical issues propelling Arizona's growing technology ecosystem. Broadcasted monthly, AZTechCast features tech leaders having real conversations about what's happening in the industry sector across the state of Arizona.

2020 Results:

Number of podcast: **9**
Featured guests : **25**



Member Spotlight Series

In partnership with Tucson-based firm Michael Beach Consulting, the TechFocus Member Spotlight Podcast highlights Arizona's growing prominence as a world-class technology hub. Each podcast episode features innovative entrepreneurs, transformative leaders and technology titans who are reshaping the state's evolving technology ecosystem in existing and emerging sectors. Broadcasted monthly, TechFocus is moderated by Linda Drake, a seasoned leadership coach and business consultant with Michael Beach Consulting. Featured companies in 2020 included Phocos, IBM, Paragon Space Development Corporation, Delta Technology, Lavidge, FreeFall 5G and Universal Avionics.

2020 Results:

Number of podcasts: **8**

SIGNATURE EVENTS

ANNUAL CONFERENCES + EXPOS



MedTech Conference

The Council's annual 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 were MedTech Committee Chair Ellen Owens Karcsay; Andrew Maynard, associate dean for Curricula and Student Success, Arizona State University College of Global Futures; and Eric Miller, principal and co-owner of PADT, Inc. Featured panelists from AdviNOW Medical, Savor Health and Aptus Engineering discussed the use of augmented and virtual reality in health care and behavioral health. Executives from MeditainmentVR, Credly, Aventria and QC-Health discussed the future of AI in health care.

2020 Results:

Total attendance in 2020: **133**



Cybersecurity Summit

The Council, Arizona Commerce Authority and the Arizona Cyber Threat Response Alliance (ACTRA) presented the seventh annual Cybersecurity Summit in December 2020. This educational breakfast summit provided actionable solutions, resources, products and services geared toward helping businesses to protect intellectual property and customer data. Keynote speaker John Evans, chief technology adviser at World Wide Technology, delivered the presentation "From Compliance to Security: An Engaging Journey to Adopting a Zero-Trust Architecture." Frank Grimmelmann, president and CEO of ACTRA, delivered the event's opening remarks. Presentation topics included practical risk management, cybersecurity litigation case studies, aligning risk management with the budget, cybersecurity issues faced by governmental bodies and nonprofits, and the value of cybersecurity insurance policies.

2020 Results:

Total attendance: **80**



Aerospace, Aviation, Defense & Manufacturing Conference

In 2020, the Council collaborated with the Arizona Commerce Authority and Arizona Manufacturing Extension Partnership to stage the state's only Aerospace, Aviation, Defense and Manufacturing (AADM) Conference. Opening keynote speaker for the November 2020 conference was World View Enterprises CEO Ryan Hartman. A veteran of the U.S. Air Force and U.S. Navy, and a graduate of Embry-Riddle Aeronautical University, Hartman's presentation "Observing Our Earth, A New Generation of Remote Sensing Solutions" delivered tremendous insight regarding the utilization of the stratosphere for scientific, commercial and economic purposes. The closing keynote presentation "The State of Battery Manufacturing: A Window of Opportunity for Arizona" was delivered by Annette Finsterbusch, president and CEO of EnPower, an early-stage startup developing next-generation Li-ion batteries.

2020 Results:

Total attendance: **70**



Arizona Photonics Days

This annual three-day conference presented by the Council's Optics Valley Committee gathered Arizona optics companies, academia, industry scientists, the astronomy community and engineers in optics and photonics, as well as partners from the Global Photonics Alliance, for a one-of-a-kind event that provided engaging keynote speakers, technical presentations, interactive discussions, business-to-business meetings and a chamber music concert. The 2020 event was hosted by The University of Arizona BIO5 Institute in Tucson and attracted over 150 attendees. The immersive event featured a welcome VIP reception, 16 technical sessions, 45 company presentations and extensive networking opportunities. Optics Valley extends its appreciation to 2020 Gold Sponsor BIO5 Institute and the 17 silver and bronze sponsors for helping to make the event a success. To learn more about Optics Valley, visit opticsvalleyaz.org.

2020 Results:

Total attendance: **160**



CEO Retreat

The two-day virtual CEO Retreat gathered technology industry visionaries, business owners, company leaders, presidents and CEOs for interactive workshops, engaging speakers, thought-provoking keynotes, panel discussions, exclusive networking and golf at Troon North Golf Club in Scottsdale sponsored by Ballard Spahr LLP. Featured speakers included opening keynote David Becker, president and CEO of First Internet Bancorp, and closing keynote Cody Friesen, founder and CEO of SOURCE Global. Lunch keynote Andy Maurer, emotional wellness coach for leaders, discussed "The Emotionally Whole Leader: The Biggest Threat to Your Leadership—And It's Not What You Think." In addition, Arizona Commerce Authority President and CEO Sandra Watson delivered "Arizona's Future Outlook" to the group of high-ranking Arizona executives.

2020 Results:

Total attendance in 2020: **66**



Smart City + IoT Conference

In 2020, the Council presented the fourth 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. Opening keynote speaker was Andrew Christian, vice president of business development and defense at Nikola Motor Company. Speakers at the event included Arizona Commerce Authority (ACA) President and CEO Sandra Watson, Big Data Southwest CEO Kirk Busch, Intel IoT Engineer Chris Ross, Verizon Managing Partner Kim Ruggiero, Aligned Data Center CIO Phill Lawson-Shanks, ACA VP of Smart Initiatives Dominic Papa, Deloitte Renewable Energy Leader Marlene Motyka, ACA CIO Brian Sherman and APS Policy Director Eric Massey.

2020 Results:

Total attendance: **80**



2020 Golf Tournaments

The Council hosts annual golf tournaments in Phoenix and Tucson. In January 2020, 88 golfers registered for the Phoenix tournament at Troon North Golf Club in Scottsdale. In September 2020, 124 golfers participated in the 10th annual Tucson golf tournament at the JW Marriott Starr Pass Golf Club. Each event included lunch, raffle prize drawings and an awards ceremony.

2020 Results:

Number of events: **2**

Total attendance: **212**



2020 Southern Arizona Tech + Business Expo:

The Council along with the Arizona Commerce Authority celebrated the eighth annual Southern Arizona Tech + Business Expo in October 2020 with over 40 exhibitors and 250+ attendees. Participants, presenters and exhibitors transformed themselves to their alter egos and experienced the Expo through the eyes of their very own avatars. Attendees networked on a beach, watched fireworks, explored virtual booths and listened to keynote and innovator presentations. Keynote speaker Roy Donelson, senior director at Raytheon Missiles and Defense, discussed "Vision with Precision for Arizona and the Globe." Other featured presentations covered the future of digital signal processing, cloud native and the quantum internet.

The Quarles & Brady 2020 Tech + Business Expo winners were:

Distinguished Service Award:

Blue Canoe Marketing

Southern Arizona Member Organization of the Year: **Edmund Optics**

Southern Arizona Innovator of the Year: **Paragon Space Development Corporation**

Southern Arizona Manufacturer of the Year: **World View**

2020 RESULTS:

Total attendance: **250**



Governor's Celebration of Innovation

An annual showcase of the 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 Arizona Commerce Authority to honor Arizona's top leaders in business, innovation, technology and government. The 17th annual GCOI event in 2020 featured Gov. Doug Ducey and Arizona State University President Dr. Michael Crow. Twenty-eight awards were presented during the awards ceremony to technology companies, community leaders and students from throughout the state. Although the 2020 awards celebration was held virtually, the engaging and interactive event featured networking rooms, virtual sponsor pages and a virtual tech showcase highlighting the innovations, success and leadership of GCOI award finalists, sponsors and partners.

2020 Results:

Total attendance: **304**

2020 GCOI Award Winners

Accountability Lifetime Achievement Award

Fletcher J. McCusker, UAVenture Capital

MSS Business Transformation Leader of the Year Award

Dr. Betsy Cantwell, The University of Arizona

Ed Denison Business Leader of the Year

Gregg Scoresby, CampusLogic

Innovator of the Year: Large Company

Becton Dickinson Peripheral Intervention

Innovator of the Year: Startup Company

Additive Implants, LLC

Innovator of the Year: Small Company

Lunewave, Inc.

Innovator of the Year: Academia

Arizona State University – Biodesign Institute

Judge's Award

Avery Therapeutics, Inc.

Legislative Award Winners

Senator of the Year:

David Gowan, District 14

Representative of the Year:

Michelle Udall, District 25

Tech 10 Award Winners

Sen. Sean Bowie, District 18
 Sen. Heather Carter, District 15
 Sen. Lupe Contreras, District 19
 Sen. Karen Fann, District 1
 Sen. Sine Kerr, District 13
 Rep. Regina Cobb, District 5
 Rep. Daniel Hernandez, District 2
 Rep. Jennifer Pawlik, District 17
 Rep. Ben Toma, District 22
 Rep. Jeff Wening, District 17

Future Innovators of the Year Award Winners

Saffeyya-Grace Ibrahim

Sonoran Science Academy, Tucson

Viraj Mehta

BASIS Scottsdale, Scottsdale

Dakota Finley

Wilcox High School, Willcox

Abby Liu

Hamilton High School, Chandler

Future Innovators of the Year: Honorable Mentions

Sadie Smith

Tucson High Magnet School, Tucson

Viveka Chinnasamy, Amy Wang and Shreya Tripathi

Hamilton High School, Chandler

Teacher of the Year Award Winner Rachna Nath

Arizona College Prep-Erie, Chandler

Teacher Honorable Mention

Alfred S. Santos

Harvest Preparatory Academy, Yuma

The background is a complex composition of overlapping geometric shapes in shades of orange, red, and blue. Various technology-related icons are scattered throughout, including a circuit board, a car, a clock, a radar, and the text 'IOT' and 'INTERNET OF THINGS'.

GOVERNOR'S CELEBRATION OF INNOVATION

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 Phoenix-based PR, content marketing and communications strategy firm Brodeur Partners. 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 electric vehicles and the future of transportation, clean and renewable energy, IoT and smart cities, broadband and 5G, edtech, risk capital, angel investing, STEM, artificial intelligence and medtech to contribute to the overall publicity for the technology industry in Arizona. In 2020, the Council issued 23 press releases on topics such as legislative priorities and endorsements, the launch of **AZTechBase.com**—an online platform that provides a comprehensive listing of companies, people and investors in Arizona's technology industry, the Governor's Celebration of Innovation Awards finalists and winners, quarterly technology industry impact data, efforts to support clean energy and economic recovery in Arizona, and partnering with nonprofit AZ StRUT (Arizona Students Recycling Used Technology) to launch a community laptop drive initiative for students in Greater Phoenix. More than 80 stories appeared in the media as a result. Additionally, Zylstra and the Council contributed to multiple media outlets regarding hot topics in technology in 2020, 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.

2020 Results:

Number of press releases: **23**
Number of published articles: **82**



Website

With upgrades, engaging technology content and added features by KEO Marketing, **aztechcouncil.org** serves as the primary resource for information about the Council and the technology ecosystem in the state. Information on the website includes industry and community events, signature technology events and networking opportunities, 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. Upgrades in 2020 included a revamped Arizona Technology Industry e-Impact Report featuring video interviews with technology leaders from a wide variety of industries, AZTechCast—the podcast of the Arizona Technology Council that features the latest industry trends and critical issues propelling Arizona's growing technology ecosystem, a new report in partnership with The Western Way titled "Innovation + Clean Energy: A Powerful Solution for Economic Recovery" and more. Year-over-year, monthly organic sessions increased 15.48% in late 2020, despite a tough year shifting from in-person events to virtual events. Strategies targeting content optimization and search engine optimization from valued member and platinum sponsor Social SEO have improved the Council's keyword rankings in a number of categories, including technology events, B2B networking events and information technology conferences.

2020 Results:

Average monthly organic sessions: **2,745**
Average monthly impressions: **13,826**



TechConnect Magazine

TechConnect is the only magazine that has covered Arizona's science and technology community for almost two decades. Launched by the Arizona Technology Council in 2005, TechConnect is dedicated to covering innovation and technology in Arizona and beyond. Produced in partnership with the Arizona Commerce Authority (ACA), the digital e-magazine 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. TechConnect showcases Arizona's technology community through profiles, feature stories, R&D analysis, entrepreneur spotlights and trend reports. The themes in 2020 were transportation, risk capital, edtech and COVID-19. Visit **aztechcouncil.org/techconnect** to read the latest issues.

2020 Results:

Number of issues: **4**
Monthly 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.

2020 Results:

Monthly circulation: **30,000**



TechTalk eNewsletter

The Council's monthly TechTalk e-newsletter is published at the end of every month. The newsletter provides featured segments on member news, content from the Council's blog, member discounts and services by the Council's Preferred Business Partners, sustainability and renewable energy, R&D, innovation, technological advancements, emerging technology sectors, industry news and more.

2020 Results:

Number of newsletters sent: **12**

Monthly circulation: **15,215**



TechFlash

In 2020, the Council continued to contribute a monthly technology blog published by the Phoenix Business Journal. Featuring Council President + CEO Steven G. Zylstra, the blog provides insight into Arizona's growing science and technology industry. The blog is read by 421,764 monthly unique visitors and 23,780 daily enews subscribers.

2020 Results:

Number of blogs: **12**

Monthly circulation: **14,077**



Greater Phoenix In Business Magazine

The Council maintains a special relationship with InMedia Company to publish a six-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 focuses on the Council's role and impact on the statewide technology community, public policy developments and event updates.

2020 Results:

Readers per issue: **98,000**



Social Media

The Council loves to engage with its innovative members, collaborative partners and friends on social media platforms. In 2020, the Council published updates on Facebook, LinkedIn, Twitter and Instagram. These channels are used to communicate Council news, member updates, new members, industry trends, event promotions and the accomplishments made by the Council and its valued members.

2020 Results:



LinkedIn

Company page followers in 2020: 6,201

Company page followers in 2019: 5,286

17% increase in followers



Facebook

Number of followers in 2020: 4,181

Number of followers in 2019: 3,985

5% increase in followers



Instagram

Number of followers in 2020: 1,134

Number of followers in 2019: 1,030

10% increase in followers



Twitter

Number of followers in 2020: 8,097

Number of followers in 2019: 8,068

.35% increase in followers

TECH EMPLOYMENT

Workforce Development

In 2020, the Arizona Technology Council helped bridge the skilled talent gap that challenges its 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. It also proactively advocated 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 2020 session. Key areas of focus included:

- Obtaining state support of \$3 million annually for five years to cultivate a statewide Arizona STEM ecosystem.
- Focusing on long-term, shared, sustainable and flexible STEM missions that bridge, integrate and strengthen the learning opportunities offered by organizations across sectors instead of isolated, independent entities.
- Expanding STEM business and education opportunities throughout rural and urban Arizona communities, fueling a strong, diverse talent pipeline prepared to meet the state's anticipated growth.
- Consistently and sustainably fund the state's education system, including pre-K, K-12, career and technical education (CTE), equitable access to dual enrollment, and postsecondary programs.

In addition to the Council's direct policy advocacy, Council President + CEO Steven G. Zylstra serves on numerous committees and boards to advocate for a robust, aligned education and workforce development system. These include the Arizona Science and Engineering Fair (chairman); Arizona Career and Technical Education Quality Skills Commission; ASU W.P. Carey School of Business Information Systems Executive Advisory Board; Maricopa Community College Workforce Development Leadership and Innovation Council; Science Foundation Arizona's STEM Network Advisory Council; University of Phoenix, College of Business and IT Advisory Council; UArizona College of Engineering Dean's Advisory Council; Greater Phoenix Chamber Cyber Workforce Collaborative Advisory Board and IT Workforce Collaborative Advisory Board; Grand Canyon University Advisory Board on STEM; Sonoran Schools Advisory Board; Paradise Valley Schools District Center for Research, Engineering, Science and Technology (CREST) Advisory Board; and the Arizona Department of Education's CTE Quality Skills Commission. Zylstra is also the lead for the Pipeline AZ Cyber/IT Hub Advisory Council that was established in late 2020.



IT/Cyber Hub Advisory Council

In 2020, the Council launched an IT/Cyber Hub Advisory Council in collaboration with the Partnership for Economic Innovation (PEI), a nonprofit of the Greater Phoenix Economic Council (GPEC); Pipeline AZ; and Futures, Inc. based on a platform originally developed for aiding military personnel transition into the workforce.

The nature of the advisory council is to provide counsel to the AZTC IT/Cyber Hub initiative, which aims to be the primary statewide source for IT and cybersecurity talent development that integrates career awareness, labor market information, education and training pathways, resources and job opportunities for current and future job seekers, educators, counselors and training providers, as well as business, workforce and economic development professionals. The Hub's ongoing efforts include leveraging, amplifying and promoting the work accomplished by local initiatives, identifying any gaps to be addressed, and adding value for job seekers.

Talent Attraction, Retention + Development

One of the Council's key areas of focus in workforce development in 2020 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 (GPCF) in the AZ Cybersecurity Workforce Collaborative and the newly formed IT Collaborative.

The GPCF 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. In addition, 2020 brought the successful completion of the Apprenti Arizona SRP apprenticeship cohort—a high-tech, mid-level apprenticeship program for nine employees of the Navajo Generating Station who received hands-on training to become IT business analysts. A second cohort—this time for cybersecurity analysts—was developed with PayPal in 2020 for a January 2021 launch.

The Council's Workforce Development and Education Committee hosted a virtual event in 2020 highlighting the growth of apprenticeships in Arizona, and helped to showcase the work of its members and partners. Arizona State University promoted its Department of Labor (DoL) grant for developing 500 IT and Cybersecurity apprentices over the next five years while Pima Community College presented on its DoL apprenticeship program covering advanced manufacturing, IT and health care roles.

Through its partnership with the Center for the Future of Arizona Pathways to Prosperity Network, the Council was able to support member company Kudelski in successfully converting its first two high school apprentices from the PXU Phoenix Coding Academy into a virtual apprenticeship, as well as commencing two new apprentices in an all-virtual process and environment.



TECH EMPLOYMENT

CONTINUED

Industry + Education Alignment

Council President + CEO Steven G. Zylstra provided the support for Arizona State University's first successful Department of Labor apprenticeship grant application, helping with outreach and awareness for the grant work started in 2020 to create 500 IT and cyber-related apprenticeships. Additionally, the Council expressed its support as part of ASU's second Department of Labor H-1B One Workforce grant application submitted in 2020, committing to convene employers to help develop and implement a more integrated workforce system—even more critical in the COVID-19 economy. The grant will use innovative training strategies and training delivery methods to provide individuals with the skills necessary to succeed in middle- and high-skilled H-1B occupations of advanced manufacturing and IT.

The Council maintained its engagement with the Maricopa County Community College District IT/Cyber Industry Sector Collaborative, which consists of faculty members from colleges across the district. These faculty, along with the entire community college district, successfully transitioned to an online instructional environment, and were able to begin offering the Google IT Certification training to interested students. Additionally, the District became the partner training organization for the AZ Cybersecurity Workforce Collaborative's second Apprenti cohort of cybersecurity apprentices. The Council also continued its membership in the Pima Community College IT/Cyber Advisory group, providing support and guidance as PCC successfully launched its new cybersecurity program, including an on-site cyber warfare range.





AZTECHBASE

Platform offers a wealth of information related to technology companies, people and investors

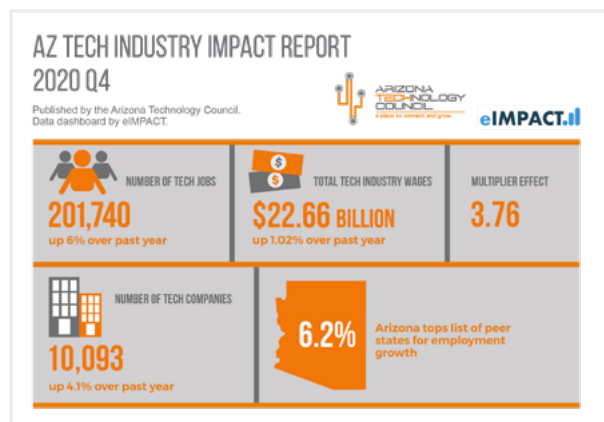
The Arizona Technology Council, in partnership with the Arizona Commerce Authority, launched AZTechBase, an online platform featuring a comprehensive listing of companies, people and investors in Arizona's technology industry. Further elevating the state's technology ecosystem, AZTechBase's 2020 debut offers vital information with normalized data such as growth, employment, funding, acquisitions and people to determine trends and patterns that define the Arizona technology community.

Serving as an excellent tool highlighting the strong activity and resources in Arizona technology ecosystem, **AZTechBase.com** provides a portal for technology leaders, businesses, investors, talent and economic development organizations to keep a finger on the pulse of the technology ecosystem, as well as collaborate and continue moving the industry forward.

There are nearly 3,000 Arizona-based companies on the platform, which represents about a third of the state's existing technology ecosystem. One of the most significant challenges Arizona technology leaders have dealt with since the industry began to flourish has been quantifying the ecosystem and sharing its impact. AZTechBase provides a substantial benefit to Arizona economic development organizations as they recruit companies from out of state, as well as to the companies in state searching for resources to start up or grow.

The platform plays a critical role in organizing data and industry insights gathered through the Council's quarterly Arizona Technology Industry Impact Report to track the progress of companies, attract talent, and discover and connect with new companies and people. This report provides a quarterly update on several vital datasets, including technology career wages, number of technology jobs, venture capital, new technology companies/startups and Small Business Innovation Research (SBIR) awards. Additionally, the platform helps support communication and interaction that has been limited by social distancing mandates in the midst of the pandemic.

To add your company and become a premium member at no charge, contact **membership@aztechcouncil.org**. Individuals, companies and organizations who want to update their profile can contact **servicedesk@AccountabilIT.com**.



ARIZONA TECHNOLOGY INDUSTRY IMPACT REPORT

Quarterly report platform provides industry growth data underpinned by insight from Arizona technology executives.

Released quarterly, the Council's Technology Industry Impact Report keeps its constituents informed on the progress of Arizona's technology community and puts a face to the industry's success stories.

On the Council's behalf, the quarterly report is compiled by **eImpact**, an organization that creates web-based, data-reporting solutions designed to help cities, industries and planners drive effective policy, create new growth and engage stakeholders. The report is based on eImpact's analysis of data from the U.S. Bureau of Labor Statistics, The Brookings Institution, CompTIA, AngelList, National Science Board and others.

Significant data points for 2020 include:

- More than 200,000 technology jobs in Arizona
- A rise in technology wages to \$22 billion
- Arizona hosts over 9,600 technology companies

In partnership with Castelazo Content Founder and Chief Content Strategist Molly Castelazo, a significant layer to the report's dashboard was added in 2020: stories of the people behind the numbers. These are the employers and employees, the innovators and investors—the people—who make the technology industry in Arizona flourish.

The report features video interviews with technology leaders across Arizona's major technology sectors in addition to the data on the industry's growth. Featured technology industry leaders from a wide spectrum including edtech, fintech, software, space and the entrepreneurial and investment ecosystems share their stories regarding personal and company growth, as well as the impact the Arizona technology support system has had on their businesses. Insight, analysis and advice from the interviews are featured in the Q4-2020 report.

View or **download the complete report** on the Arizona Technology Council's website.

The report can also be found on **aztechbase.com**, a new online platform launched by the Council in partnership with the Arizona Commerce Authority that provides a comprehensive listing of companies, people and investors in Arizona's technology industry.



MULTIPLE EMPLOYER 401(K) PLAN

The Arizona Technology Council partners with Empower Retirement (formerly MassMutual) to provide member companies a unique way to leverage the buying power of the Council by participating in a 401(k) multiple employer plan (MEP). Endorsed nationally by TECNA (Technology Councils of North America), a multiple employer plan 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 U.S. 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.



Christen Lange, QPA, QKA, TGPC

Account Manager

Nova 401(k) Associates

713.881.9342

CLange@nova401k.com

See the facts:

- MEP started in 2014
- 18 participating employers
- \$13.4 million in plan assets
- 624 eligible plan 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, Christen Lange.

LAPTOP DRIVE: SUPPORTING REMOTE LEARNING



Arizona Technology Council Partners with AZ StRUT for Arizona Students

Many school systems closed in 2020 due to the COVID-19 pandemic then scrambled to launch online learning. It became clear very quickly that continuing education from home was a significant challenge for many students. According to state Superintendent of Public Instruction Kathy Hoffman, an estimated 100,000 students were without their own laptops to continue learning online. Without remote access, many students were unable to connect with virtual learning, assignments and other essential resources to stay on track with their education.

To ensure no student was left without a fighting chance to obtain a proper education, the Arizona Technology Council partnered with AZ StRUT (Arizona Students Recycling Used Technology), a 501(c)(3) nonprofit that supports Arizona's technical education, to launch a donation drive in 2020 to obtain laptops and chargers to be refurbished and distributed to students. Efforts were quickly ramped up to enable the distribution of laptops directly to Title I students in need.

Title I is the designation by the U.S. Department of Education for schools that receive supplemental funds to assist their large concentrations of low-income students in meeting state academic standards. Unfortunately, remote online learning is not an option for many Title I students in rural and underserved schools in Arizona.

Join Our Cause

Arizona businesses can visit azstrut.org/pick-up-request to request an AZ StRUT representative to retrieve up to 40 laptops and chargers. Individuals who have new or used laptops and chargers to donate can also drop them off at a Batteries + Bulbs store. To find the nearest Batteries + Bulbs location, visit batteriesplus.com.

PREMIUM HEALTH CARE



Association Health Plan with Blue Cross Blue Shield of Arizona

The Arizona Technology Council understands the challenges, barriers and impediments that many startups and small businesses face. That is exactly the reason why the Council announced the launch of its own association health plan (AHP) in partnership with Blue Cross Blue Shield of Arizona in October 2019.

Since the official launch in January 2020, the Arizona Technology Council's Employee Benefit Trust has helped 24 technology industry employers with 232 employees across the state find lower cost and richer benefits for their companies.

The growth of the Council's association health plan in 2020 has enabled many member organizations, small businesses and startups with the opportunity to provide more generous overall compensation packages to their employees, a critical factor in helping technology companies attract and retain top talent.

See the facts:

- The Council's AHP achieved 200% growth in employers and 130% growth in employees in 2020.
- The health plan's current gross annualized premium is \$2,945,811.
- The average group size of an employer participant is 10 employees.

Advantages of the program:

Technology industry employers with as few as two employees now have access to a comprehensive benefits package that includes medical, dental and vision coverage; life insurance and AD&D; 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.

- **Access:** Participating companies have access to statewide network, including the Mayo Clinic, with exclusive network options in Maricopa and Pima counties.
- **Choice:** Choose from a wide selection of primary care providers and specialists.
- **Service:** Local customer service provides care and claims support.
- **Flexibility:** Coverage is 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 association health plan, visit aztechcouncil.org/AHP.

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 in 2020 by Justin Smart, account manager at Interlink Engineering and Krishna Muralidharan, associate professor at The University of Arizona. 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 the Council's member services team by fostering peer-to-peer relationships between new members and members' representatives and facilitating networking opportunities and strengthening member retention. The outgoing Committee Chair in 2020 was Stephanie Barnhart, vice president and commercial relationship manager at First Internet Bank. The new Ambassador Committee Chair is Chelsea Scruggs, business development executive at Allata. Due to the pandemic's social distancing measures in 2020, the committee was on hiatus for most of the year.

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 of 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. The Committee planned and executed its annual Cybersecurity Summit held in December 2020. The sixth annual event was hosted in partnership with the Arizona Commerce Authority (ACA) and Arizona Cyber Threat Response Alliance (ACTRA). The Council's Law + Technology Committee also partnered on this virtual 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. John Evans, chief technology adviser at World Wide Technology, delivered the keynote presentation. Spotlight exchanges with key cyber experts covered such topics as cybersecurity insurance policies, and aligning risk management with budgets, and cybersecurity issues faced by governmental bodies and nonprofits.

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 is 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 vice president of membership services, is the staff liaison. In 2020, the Committee held two 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 2020, the Committee partnered with the Council's Cybersecurity Committee for the Annual Cybersecurity Summit, which featured keynote speakers and a series of spotlight-exchange discussions.

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 2020 co-chairs were Sheila Kloefkorn, president and CEO of KEO Marketing and Susanne Lake, CEO and founder of Slake Consulting. 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 2020 featured such topics as strategies to scale a B2B marketing program, how martech and internal communications help companies thrive, how to integrate your martech stack to empower all stakeholders, and thriving in a change era. Staff liaison is Jill Brownley, director of marketing + communications.

MedTech Committee

Created to bring together executive and product design teams from medical devices and software, health and bioscience, telemedicine, and health care delivery, the MedTech Committee meets monthly to share best practices and peer-to-peer networking to accelerate individual and collective growth. The MedTech Committee, led by Chair Ellen Owens-Karcsay, owner and principal of Karcsay Consulting Group, defines the theme and selects the keynote speakers and panelists for the Council's annual MedTech Conference. In 2020, the MedTech Conference featured keynote presentations from Andrew Maynard, associate dean for Arizona State University's College of Global Futures and PADT, Inc. Co-founder and Principal Eric Miller. Expert panelists from AdviNow Medical, Savor Health and Aptus Engineering discussed the use of augmented and virtual reality in health care and behavioral health. And tech leaders from MeditainmentVR, Credly and QC-Health shared their insight regarding the future of augmented reality, virtual reality and artificial intelligence in health care. Staff liaison is Deborah Zack, vice president, member services.

Optics Valley Committee

Since its formation in 2017, the Optics Valley Committee has provided leadership within the optics community statewide to coordinate education, promote innovation, and market the region's products and technologies. Meeting quarterly, its members promote the advancement of optics and photonics worldwide. These enabling technologies are integral to a vast array of products ranging from cell phones to medical diagnostics. The Committee's flagship event is the annual Arizona Photonics Days: three days of technical discussions, business-to-business meetings, and networking to discuss global optics and photonics issues with peers and leaders in the industry. Throughout the year, Committee Co-chairs John Dennis and Jack Schumann work closely with the UArizona Wyant College of Optical Sciences, the Arizona Commerce Authority and many community partners to showcase this important industry. Staff liaison is Jamie Neilson, operations 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 2020 garnered 11 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

STANDING COMMITTEES CONTINUED

business compliance, reducing cost, recouping time and providing peace of mind.

The 2020 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 jdhInsights
- Employee health benefit plans by Blue Cross Blue Shield of Arizona
- 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
- Moving services by M3 Commercial Moving & Logistics

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 (P3) to monitor the impact that legislation has on the health and growth of Arizona's technology industry. Jason Bagley, senior director of state government relations at Intel Corporation, served as the committee chair in 2020 and was supported by Council President + CEO Steven G. Zylstra and Executive Emeritus Ron Schott.

The Public Policy Committee's top legislative priorities for 2020 were:

- Ensure proven economic development programs such as the Angel

Investment Tax Credit and current levels of the Research and Development Tax Credit are reauthorized past their sunset dates of 2021.

- Obtain state support of \$3 million annually for five years to cultivate a statewide Arizona STEM ecosystem.
- Consistently and sustainably fund the state's education system, including pre-K, K-12, career and technical education (CTE), equitable access to dual enrollment, and postsecondary programs.
- Support Arizona tax system improvements to strengthen competitiveness, fairness and predictability, specifically establishing statutory clarification on taxation of digital goods and services.

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 technology ecosystem. Led by Chair Diane Smigel, president and CEO of Palladium IT Advisors, and Council liaison Deborah Zack, vice president, membership services, the committee facilitated three major events in 2020. The January 2020 event featured a panel of female technology leaders from Ticketmaster. The June 2020 event featured Intel Corporation's Director of Global Diversity Reuben Miller. The September 2020 event "Understanding Racism: Historical Context and Call to Action" featured accomplished HR executives Patricia Davis and TJ Lowery who provided an educational and provocative baseline for better understanding the quest for ending systemic racism and moving towards racial equality.

Women in the Workforce (Tucson)

Less of a committee and more of a female-focused event series, the Women in the Workforce group provides quarterly educational and networking events for women in the technology industry. In 2020, the Committee planned and executed three events addressing the progressive stages of a career path from early-career to C-level, the challenges and opportunities of working in a primarily

male environment, and strategies to achieve better work-life balance. These topics were explored through featured speakers, 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 2020, the Committee collaborated with the Council's Cybersecurity Committee, Public Policy Committee and the SciTech Institute to continue to develop a robust, aligned education and technology workforce development system, proactively support science, technology, engineering and math (STEM) education at all levels, and help bridge the skilled talent gap that challenges Council members across industries and disciplines.

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 Board Chair Eric Miller, principal and co-owner, PADT, Inc.; Eric Lewis, partner, EY; Austin Harris, vice president of commercial banking, Alliance Bank of Arizona; Rebecca Clyde, CEO and co-founder, Botco.ai; 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 Council's Executive Committee helps to shape the content of the board meetings. The members of the Committee during 2020 were Board Chair Eric Miller, principal and co-owner, PADT, Inc.; Board Vice-Chair Alex Iuorio, senior vice president of supplier development, Avnet; Board Secretary Jon Talcott, attorney, Ballard Spahr, LLP; Treasurer Eric Lewis, partner, EY; Michael Hawksworth, president, MSS Business Transformation Advisory; 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.

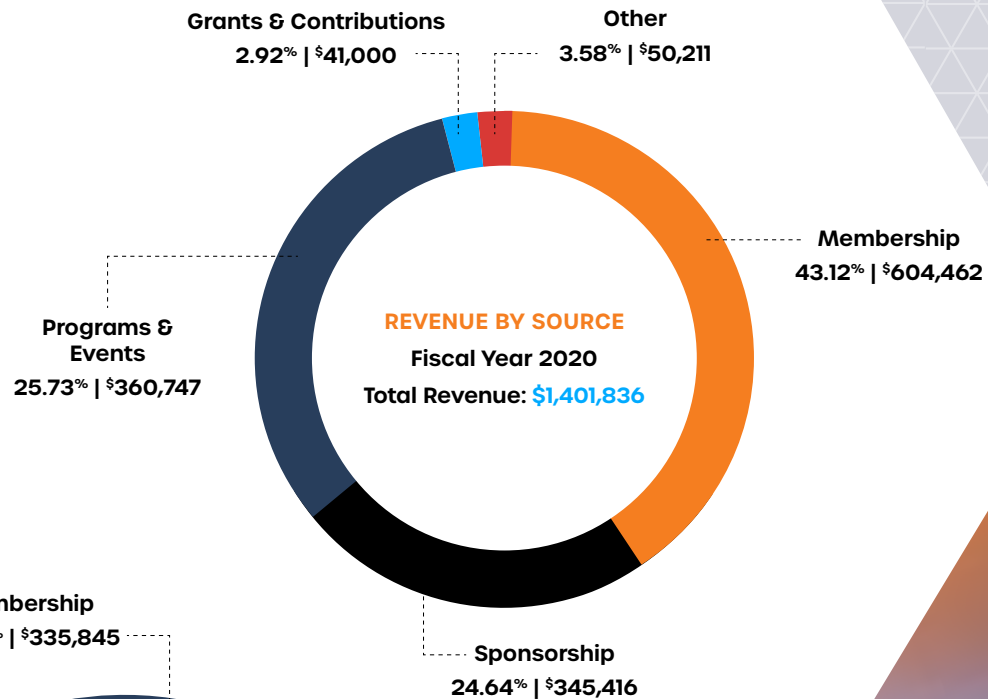
Investment Committee

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 2020. 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. In 2020, the Council transitioned from its partnership with Slavic401k to Empower Retirement (formerly MassMutual), NOVA 401k Associates and ATS to fulfill the fiduciary and administrative responsibilities for the plan. There were 18 participating employers in the MEP 401(k) program as of the end of 2020 with \$13.4 million in plan assets.

BY THE NUMBERS

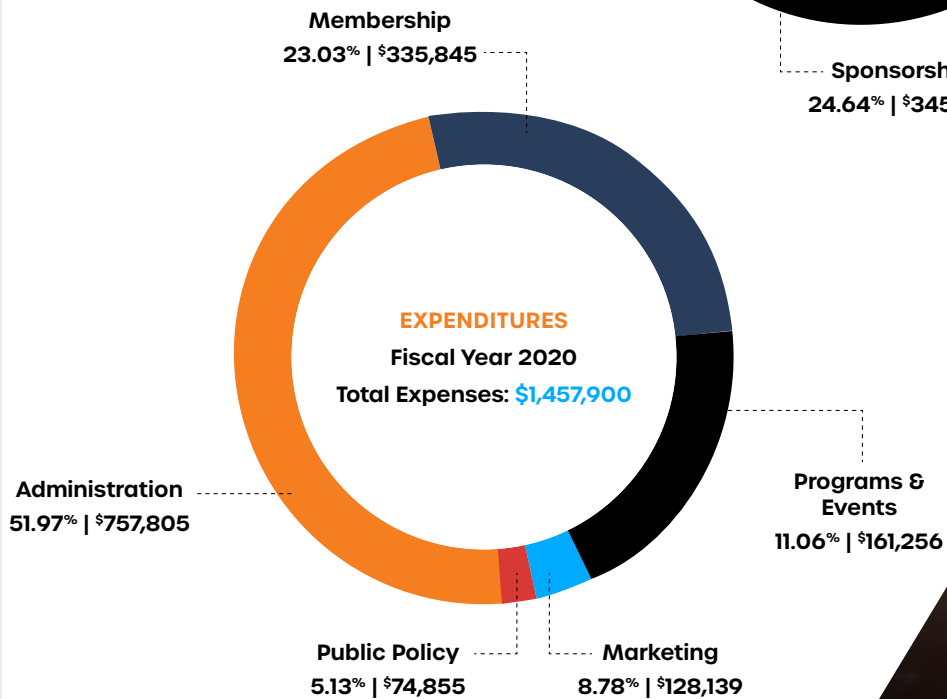
REVENUE BY SOURCE

Fiscal Year 2020
Total Revenue: **\$1,401,836**



EXPENDITURES

Fiscal Year 2020
Total Expenses: **\$1,457,900**





PEER GROUPS

Aerospace & Defense CEO Network

The Council's 2020 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 technology-based industry sectors 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 monthly meetings.

2020 Members:

- Mary Bailey, Rincon Research
- Shubhayu Chakraborty, CIS Global
- Paul DeHerrera, Innovative Avionics
- Jason Douglas, Tangent Aviation
- Carlos Fernandez, BF&S
- Andy Griffis, The Sensor Group
- Callie Groth, BlackBar Engineering
- Ryan Hartman, World View
- Dennis Kenman, Tucson Embedded Systems
- Patrick Marcus, Marcus Engineering
- James E. Millerd, 4D Technology
- Marilyn Speert, TMM Precision
- Alex Rodriguez, FreeFall 5G
- Marilyn Speert, TMM Precision
- Howard Stewart, AGM Container Corporation
- Austin Yamada, University Applied Research Corporation
- Darrel Yarbrough, Yarbrough Electronic Sales

STEM PROGRAMS



Building a Stronger STEM Ecosystem

SciTech Institute, the Arizona Technology Council's nonprofit partner, brings together myriad collaborators to strengthen Arizona's science, technology, engineering and mathematics (STEM) pipeline. Led by Executive Director Dr. Jeremy Babendure, SciTech Institute works as a guiding catalyst for STEM awareness, engagement and learning. The organization is developing and implementing programs that support its vision of putting STEM within reach of every human being in Arizona and beyond, as well as facilitating initiatives that highlight STEM careers and opportunities.

To foster STEM access, SciTech Institute is cultivating an Arizona STEM ecosystem of nonprofits, civic, business, industry and academic organizations. These entities are integral to the success of two of the most robust STEM initiatives in Arizona: SciTech Institute's Arizona SciTech Festival and the Chief Science Officers (CSO) program funded by the National Science Foundation (NSF). SciTech Institute also brings entities together through the Arizona Advanced Manufacturing Coalition, NSF-funded Rural Activation and Innovation Network (RAIN), and the East Valley STEM Alliance, among others. Finally, SciTech Institute supports other STEM-related efforts across the state, such as the Counting Bee and annual Arizona Science Bowls for middle- and high-school students.

Notably, SciTech Institute also has expanded several of its programs globally. Collaboration with the Council and Arizona Commerce Authority supported the launch of the Sonora SciTech Festival in Mexico, and the 2020-2021 CSO program has cohorts in nine states and four countries. To learn more, visit <https://scitechinstitute.org>.

SciTech Institute Programs

- Arizona STEM Ecosystem
- Arizona SciTech Festival
- Chief Science Officers
- Arizona K-8 Consortium
- Arizona STEM School Community of Practice
- Arizona Advanced Manufacturing Coalition
- Science For All, LLC

Arizona STEM Ecosystem

The Arizona STEM Ecosystem is a collaborative, grassroots network of more than 900 business, education, community and government organizations. Serving as the ecosystem's backbone organization, SciTech Institute collaborates with these entities to promote STEM awareness and career pathways, build leadership and employability skills, and foster a diverse pipeline of qualified Arizonans entering higher-education institutions and the workforce. SciTech Institute is establishing a network of regional hubs to nurture partnerships and synergies across geographic and economic boundaries. The Arizona STEM Ecosystem is leveraging the state's flourishing industry base to position Arizona as a national leader in STEM and its related fields. Key achievements in 2020 included:

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 Corporation
Diana McMahon Salt River Project
Jeff Unruh Alerion Capital Group LLC
Steven G. Zylstra Arizona Technology Council and SciTech Institute

- The launch of a comprehensive digital resource directory with links to learning resources for educators, students and parents: scitechinstitute.org/resources.
- Teaming up with the Arizona Science Center to launch the virtual video conference series STEM Community Lunchtime Conversations as a means of ensuring the STEM community remains engaged and connected despite the social distancing forced by COVID-19.
- Establishing the Arizona Working Group on Diversity, Equity and Inclusion (DEI) in STEM, which consists of more than 30 educators, administrators and STEM professionals. The group facilitates an inclusive forum for stakeholders from myriad backgrounds, professions and groups to discuss, share resources and take action for equity in STEM learning.

Arizona SciTech Festival

The Arizona SciTech Festival, SciTech Institute's cornerstone initiative, informs and invites Arizona's community at large to engage in the growing conversation about STEM. Supported by the Council, Arizona Commerce Authority, Arizona Science Center, Arizona State University, The University of Arizona and Arizona Board of Regents, the Festival recognizes the growth and impact of STEM. It offers people from all walks of life access to STEM learning and engagement. The two-month annual celebration provides participants with a multitude of events and activities delivered by the Arizona STEM Ecosystem's 900-plus partners and stakeholders from more than 80 communities.

Through hands-on learning opportunities, expos, workshops, exhibitions, unique activities and experiences, tours and more, the Festival fosters a better understanding of the prevalence and importance of STEM. Most importantly, it inspires Arizonans of all ages to pursue STEM-related fields of study and careers. In 2020, 331 Festival events in 32 Arizona cities and towns were held before COVID-19 forced the cancellation of large gatherings. These events reached more than 100,000 people from across the state, including many rural and underserved populations.

Chief Science Officers (NSF Award #1615209)

The Chief Science Officers (CSO) program aims to place youth squarely in the center of STEM promotion, experience



and community action, ultimately strengthening the future STEM workforce. CSOs are students in grades 6 through 12 who champion the interest, engagement and communication of STEM and innovation on and off campus. They engage in leadership training and plan STEM engagement activities that reflect their peers' interests. CSOs also streamline a connection to local scientists, STEM professionals and organizations, working with these entities to offer peers and community members hands-on experiences that build STEM awareness and workforce skills. CSOs also function as unified regional cabinets, engaging in local, regional and national conversations to create a positive perception of STEM (or STEAM when the arts are included), transform school and community culture, and broaden participation.

Since its inception, the program has experienced significant state, national and international growth with 854 CSOs engaged in 2019-2020. The Arizona cohort consisted of 302 CSOs from 126 schools. The remaining CSOs spanned the globe from Kenya to Mexico to Kuwait, as well as U.S. 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.

Arizona K-8 Consortium (NSF Award #2031527)

In November 2020, SciTech Institute received a 1½-year NSF grant to establish the Arizona K-8 Consortium. The goals are to build local education capacity, enable all Arizona schools to meet computer science and computational thinking (CS/CT) requirements, and support iterative, continuous professional development via professional learning communities. Housed at SciTech Institute, the Consortium and members Arizona Science Center, Arizona State University and BootUp Professional Development (BootUp PD) are leveraging Arizona STEM Ecosystem and Rural Activation and Innovation Network (RAIN) partners to empower rural and tribal educators and leaders through research-practitioner partnerships (RPPs). The first phase of this three-pronged project is engaging these stakeholders, CS/CT and educational researchers, and the Arizona Department of Education in laying the foundation for these partnerships. During the second phase, regional RPP teams will work to integrate CS/CT into rural and tribal K-8 education in northeastern, northwestern, central, southern and eastern Arizona. The final phase will expand partnerships and capacity building to secondary education and other areas of interest identified by rural practitioners.

STEM PROGRAMS CONTINUED

Arizona STEM School Community of Practice

The Arizona STEM School Community of Practice is a collaborative network of Arizona school administrators, teachers, students, STEM industry leaders and community members working to propel science, technology, engineering and math education in their communities. Involvement provides members with ideas, resources and support to grow STEM in schools and local communities. It also offers students the opportunity to network with professionals, learn about opportunities and see how viable a career with ties to STEM can be.

Arizona Advanced Manufacturing Coalition

The Arizona Advanced Manufacturing Coalition (AAMC) seeks to strengthen Arizona's advanced manufacturing workforce by engaging industry, K-12 institutions, community colleges, universities, civic and community organizations, and workforce and economic development groups in building career pathway awareness. AAMC fosters collaboration within and between industry and key stakeholders to introduce youth to advanced manufacturing through activities such as tours, guest speakers and career days. These efforts also leverage statewide economic development efforts and reskilling opportunities for Arizonans as the state recovers from COVID-19 impacts, enhancing state investments in advanced manufacturing and STEM, and aligning efforts with the White House's STEM strategies.

Science For All, LLC

Science for All, LLC is SciTech Institute's fundraising arm. As a 501(c)(3) Arizona-certified, qualifying charitable organization, it supports the Chief Science Officers and other SciTech Institute programs providing disadvantaged youth access to STEM resources and opportunities. Science for All enables these youth to gain critical employability skills and the experience necessary to become STEM professionals. It supports skill development through hands-on experiences, job training programs, mentorships, internships and other activities. This next generation of STEM professionals, science educators and leaders will drive innovation, solve problems and create technology never imagined previously. Fostering STEM pathways



will help attract employers to Arizona and improve the state's standing as a world-class STEM and technology hub. Donations to Science for All, LLC do 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, visit

scitechinstitute.org/programs/science-for-all.

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.

Programs supported by SciTech Institute

Arizona Science Bowls

The Arizona Middle School 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 held at Arizona State University's West Campus in partnership with ASU's New College of Interdisciplinary Arts and Sciences and the School of Mathematical and Natural Science. Council member Solugenix is the primary sponsor of the Arizona Science Bowls. Similar competitions are facilitated nationally by the U.S. Department of Energy and draw more than 14,000 students each year. Regional winners compete at the national event in Washington, D.C. In 2020, a team of high school students from BASIS Chandler and a team of middle school students from BASIS Peoria won their respective regional competitions before competing in the national finals. Over the last decade, Arizona Science Bowls have reached thousands of students and successfully promoted excellence in STEM education while furthering the cause to build a world-class workforce in Arizona.



National Counting Bee

The National Counting Bee™ is a 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 annual 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 math skills and promote numeracy. Teachers register their students and run a school-based competition to identify top-scoring contestants for the national competition. Matches include a 15-second countdown in which "mathletes" race to compute as many answers in at each level as they can. Participants are given a random starting number for each level and directed to count by a fixed number. At least seven correct answers are needed to proceed to the next level.

East Valley STEM Alliance

SciTech Institute serves as a key supporter of the East Valley STEM Alliance (EVSA), a networking group open to East Valley companies, school districts

and nonprofits focused on STEM. EVSA's primary goal is to meet future workforce demands by connecting and inspiring youth about technology and innovation careers.

Rural Activation and Innovation Network (RAIN) (NSF Award #1612555)

The Rural Activation and Innovation Network (RAIN) engages community partners in informal STEM awareness and knowledge-building collaboration and seeks to help STEM gain traction in Arizona's rural communities. Supported by SciTech Institute, Arizona State University, the Arizona Science Center and Center of Science and Industry's Lifelong Learning Group, RAIN bridges local STEM organizations and leaders with Navapache, Cochise County, Verde Valley and Graham/Greenlee rural communities to strengthen their education and workforce pipelines. Program goals include increasing opportunities for children and families to interact with professionals to learn about STEM-based careers inside and outside their communities. The program is developing models for sustainable rural collaborative partnerships involving STEM.

STEM PROGRAMS CONTINUED

Inclusive STEM Learning Opportunities for People with ASD (NSF Award #2005901)

Supporting the inclusion of individuals with autism spectrum disorder (ASD) in STEM learning is a key focus area for the National Science Foundation. This initiative is led by the Institute for Learning Innovation, in which SciTech Institute Executive Director Dr. Jeremy Babendure is a fellow and done in partnership with the Southwest Autism Research & Resource Center. The purpose is to develop custom professional development education for practitioners working in informal STEM learning institutions (e.g., museums, science centers, etc.) and evidenced-based programming. Informal STEM learning collaborators include the Museum of Natural History, i.d.e.a. Museum, Pueblo Grande Museum and Arizona Science Center. This 2½ -year phase I project lays the foundation for a 10-year study that will develop an evidence-based, sustainable ASD professional development program; online resource center; and community of practice that can be readily adapted to most, if not all, informal STEM education institutions.

Teen Science Café Network (NSF Award #2005815)

The National Teen Science Café Network (TSCN) provides youth with a new perspective on the nature of science and see scientists as successful people leading interesting lives by connecting them to STEM and its experts. Facilitated by a grant from NSF, SciTech Institute will work with TSCN to enable CSOs to host Teen Science Cafés, promote peer engagement, and bring STEM experts to their schools and communities.

After the Bridgerian Crash: An Integrated Analysis of Mammalian Paleocommunities and Paleoecologies During the Middle Eocene (NSF Award #2011695)

This NSF-funded Midwestern University project will research how Earth's ecosystems have responded to extreme warming by investigating changes in mammalian diversity, vegetation and soil development in 45 million-year-old deposits found in northeastern Utah. The results of this work will provide an opportunity to use the past to understand the impacts of climate change for managing critical habitat resources. The study facilitates the development of scientific expertise for undergraduate students, create a K-12 curriculum, and provide science outreach at museums via exhibits and modules. Engaged in curriculum development and outreach, CSOs provide an essential voice in the conversation.

Arizona Infiniscope CSO Student Advisory Board (NASA Award #NNX16AD79A)

A partnership between the Arizona CSO program and the NASA-supported Infiniscope program at Arizona State University provides the opportunity for CSOs to act as advisors and assist in developing digital-learning experiences. This opportunity gives them a voice in the creative process and immerses them in a STEM-career environment.



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Caterpillar Inc.	cloudIT	Cyberitas Technologies	Eagle Private Equity
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CBIZ Benefits and Insurance Services, Inc.	CNA	CyrusOne	Eclipse Automation
Creative Business Resources	Cognixia Inc.	Cyxtera Technologies	Economic Collaborative of Northern Arizona
CCG Catalyst Consulting	Cognizant	Dale Carnegie Training of Arizona	ED2 Corp
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Employers Council	Fusion Risk Management	Harvard Group International	Infinity Insurance Partners
Empower Partnerships	Galvanize	HAtech LLC	InfoArmor
enChoice, Inc.	Garment Graphics and Promotional Marketing	Hathority, LLC	InnovaQuartz-Silica Physics
Encora	Gate6	Health Current	Innovative Avionics, LLC
Enliven Production Group	Genius Monkey	Health Information Management Systems	Innovative IT Solutions LLC
Enterprise Holdings	Gentap LLC	HealthTrio LLC	INOV, INC., Optical Engineering & Product Development
Enterprise Technology Services	Geoz Global LLC	Hexagon Mining	In-Position Technologies
Entrepix, Inc.	Girikon, Inc	HG Consulting, LLC	Insight Enterprises Inc
Envirosystems Mfg., LLC	Girl Scouts of Southern Arizona	HighPeak Advisors LLC	Insulin Initiative
Ephibian Inc	Global Chamber	Hire Capacity	Integrated Accounting Services, LLC
EpiFinder	Global Electronics AZ LLC	HireRising	Integrated Axis Technology Group
ER2 - Electronic Responsible Recyclers	Global Patent Solutions, LLC	Hi-Tech Machining and Engineering Inc.	Integrated Management Resources, LLC
ERISA Benefits Law, PLLC	Global Superabrasives	Hofstadter Analytical Services, LLC	Integrity Outsource
Ernst & Young	Go Engineering	Homie	Intel Corporation
eTrack Tech, Inc.	GMP Networks, LLC	Honeywell	Inteliflows
EV Group	Goodway Group	Horizon Honors Schools	InterLink Engineering
Evergreen Capital Holdings, LLC	Goodwill of Central and Northern Arizona	Horizon Moving & Logistics	International Research Center
Execute to Win	Google Cloud	Hourglass Education Technology Solutions, LLC	INTEROPTICS, LLC
Expedient	GPS Insight	House Trevethan	INTUGO
Experis IT	Grace Steel & Fabrication, LLC	Howe Industries LLC	Intuor Technologies, LLC
Exponent	Grand Canyon University	HTech, LLC	Involta
ExtraHop Networks, Inc.	Grant Thornton LLP	Hydronalix	Iota
Fasturtle Digital	GraySpace, LLC	HyeTech Network & Security Solutions, LLC	IRLabs, Inc.
Fennemore Craig PC	Greater Phoenix Chamber of Commerce	i2Verify	Iron Mountain Data Center Services, LLC
Filconn	Greater Phoenix Convention & Visitors Bureau	IBG Fox & Fin	iSolved
Fintrepid Solutions	Greater Phoenix Economic Council	IBM	IT Yug LLC
First Internet Bank	Greenlight Traffic Engineering	IBW Advisors LLC	jdH Insights, LLC
FirstDigital Telecom	Greenspoon Marder LLP	IdeaMagic Digital Marketing Solutions	Jennings, Strouss & Salmon, PLC
FISBA	Gregory & Associates	Ideas Collide	JFS Embedded Solutions, LLC

JNR Networks	Lee & Associates	Metropolitan Education Commission	Newbridge Technology Solutions
JobPath Inc.	LeeShanok Network Solutions	Metz & Associates PLLC	Newtek, the Small Business Authority
Junior Achievement of Arizona Inc.	Leonardo Electronics	Michael Beach Coaching & Consulting, LLC	Nextiva
Junora LTD	LevelUp Growth Partners LLC	MicroAge	NJOY, LLC
JusticeTrax, Inc.	LevRose Commercial RE / Baumgardner Group	Millennium Information Technology, LLC	Nlets
JW Marriott Starr Pass	Life365	Mindbody	Nocira
Karcsay Consulting Group	LifeCycle Delivery	MKS Imaging Technology LLC	Nogales Unified School District
Katalize LLC	Lightsense Technology	mLogica	Norcon Technologies LLC
Keap	Liquidity Partners LLC	Mobile Force Refueling	Northern Arizona Center for Entrepreneurship and Technology
Kenect Phoenix	LM Industries Group, Inc.	Mobile Mini	Northern Arizona University
KEO Marketing Inc.	Local First Arizona	Modis IT and Engineering	Northstar Aerospace
Kevin Black Consulting	Lovitt & Touche	Modular Mining	Nothing But NET
Keyser	LSI	Momentum Telecom	Nova-IR Inc.
KinetX, Inc.	Lucas Technology and Business Solutions	Moog, Inc.	NP Photonics, Inc.
Kingston Business Solutions	Lumen Technologies	Morgan Stanley	ONE Community
Kirsh Manufacturing, Inc.	Lyft	Moss Adams	OneBeacon Insurance
KiteRocket, LLC	M Culinary Concepts	Motion Recruitment	OppsSpot, LLC
Kiyohara Optics Inc.	M3 Commercial Moving — Muscular Moving Men and Storage	Mousegraphics	Oppty Unlimited
Klontech Measurement Solutions	Magenium Solutions Powered by AVI	mrktstreet	OpsTel Services
KM2 Consulting	MaHBOC LLC	MSI Tec	Opt-E
Knolshare	Marana Unified School District	MSS Business Transformation	Optical Perspectives Group, LLC
Knosis Health, LLC	Marcus Engineering, LLC	MST Solutions	Optical Support, Inc.
Kobargo Technology Partners	Marcus Networking Inc.	MT Manufacturing Services	Optical Systems Design, LLC
Kogni LLC	Maricopa Community Colleges	MultiWare LLC	OraVu
KPMG LLP	Maricopa Corporate College	Mundt & Associates	Oryx Additive
Kryterion	Maricopa County School Superintendent's Office	NACERO INC.	Osborn Maledon PA
Kudelski Security	Marriott Williams Centre Island Hospitality Management	National Bank of Arizona	OSI Global IT
kW Mission Critical Engineering	Marsh	National Technical Systems	Pacific Office Automation
L&W Technology Inc.	Matellio Inc.	Neeme Systems Solutions, Inc.	Pacific Scientific
L3 Latitude	Maven Project Management, LLC	NeoLight	PacketWatch
Laird Brown Photography	McKesson	NESCO Resource Professional Services	PADT, Inc.
Lamson Consulting	McMardon Investment LLC.	Netrality Data Centers	Palladium IT Advisors LLC
LaneTerralever	Mediato Technologies	NetScout	Paradigm Manufacturing
Lavidge	MegaplaniT	Neubloc	Paradox, Inc.
Lazarus Alliance, Inc.	meltmedia	New Discovery	Paragon IT Professionals
Lean Technologies, Inc	MeMD	New Genesis Solutions	Paragon Space Development Corp.
Leaseweb	Metromile	New York Life	

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Parchment	Precision Shooting Equipment, Inc.	Robert Half Technology	Skysong Innovations
Pashtek	Predictive Solutions Engineering, LLC	Rogers Corporation	Slake Consulting
PayPal North America	Prenda	Ronstadt Insurance, Inc.	SMART Embedded Computing
Pearl Street	Prime Solutions Group, Inc	Root Insurance	SmartCapital Limited, LLC
Penumbra Engineering	Prism Global Marketing Solutions	Ruda-Cardinal, Inc.	Snell & Wilmer
Perkins Coie LLC	Procopio, Cory, Hargreaves & Savitch LLP	Rugo Machine Shop Services, LLC	SocialSEO
Persosa	Promineo Tech	Rytek Technical Service	Society for Science & the Public
Phantom Aerial Solutions	Protecht	Sahuarita Unified School District	SoftServe, Inc.
Phantom Space Corporation	Prototron Circuits	SALEO	Software Management Consultants, Inc.
Phocos Americas	PSG Solutions, LLC	Salt River Project	SoftwareONE
Phoenix Business Journal	Public Policy Partners	San Miguel Corporate Internship Program	Solera Health, Inc.
Phoenix Children's Hospital Foundation	QBotica	Sandbrook Group	Solugenix Corporation
Phoenix Community Alliance	QED2, LLC	Sandler Training by Mercury	Sondhi Solutions, LLC
Photonics Automation Specialties, LLC	QlikTech Inc.	Sandra Day O'Connor College of Law Center for Law, Science & Innovation	Sonora Quest Laboratories
Phx — IT	QuakeWrap	Saratech	Sonora Software
Pima Association of Governments	Quarles & Brady, LLP	SC4E, LLC	Sonoran Schools
Pima Community College	Quest	SCAD Media	South32
Pima County	Qwaltec	Sciblo & Associates	Southern Arizona Arts & Cultural Alliance
Pima County Information Technology Department	Quick	Scientific Technologies Corporation	Southern Arizona Research, Science, and Engineering Foundation
Pima County JTED	R3EWaste	Scorpion Technologies LLC	Southwest Alliance for Excellence
Pima County One-Stop/Arizona@Work	Radius AI	Scottsdale Area Chamber of Commerce	SparkLight
Pinal Partnership	Randstad	Sears Gerbo Architecture	SparrowOne, LLC
Pinnacle Peak Partners	Recruit Bit Security	Securaplane Technologies Inc.	Spear Education
PioneerB1	Red Frame Innovations, LLC	SecureAuth Corporation	Spectral Instruments, Inc.
Pipeline Design & Engineering	Red Magnet Design LLC	SEMI	Spectrum, LLC
PlanetOne Communications, Inc.	REDW LLC	ServerLift Corporation	Spencer Fane LLP
Plus Consulting, LLC	Reel IT Solutions LLC	SGNT	SPIE
PMCS	Remarkable Health	Sharp Decisions, Inc.	Spirit Electronics
PNC Financial Services Group, Inc.	Renren US Holdco, Inc.	Shin-Etsu MicroSi	Spracht
Point B, Inc.	Republic Services, Inc.	Signature Consultants	SquadPod
Polsinelli PC	Resonea	Silent Sector - Cyber Security Solutions	Stackhouse
Polymer Chemistry Innovations	RexPay, Inc.	Silicon Forest Electronics	Star2Star Communications
Ponderosa Hotel Management Services, LLC	RF Insurance Group	Silicon Valley Bank	Startup Tucson
Poore & Associates	RGROUP Professional Services	Simpleview	STEM Sports
Porch Pirate Parlay, LLC	Rincon Research Corporation	Sky Harbor International Airport	STEM+C Inc.
PostBidShip, Inc.	RiskSense	Sky Republic Inc.	Steven R Miller LLC, DBA Aperio DSP
Pravici LLC	Rizse Inc.		

Stifel Private Client Group	The Next Step Agency	Unity Connected Solutions, Inc.	Watershed Idea Foundry
Straight Engineering LLC	The Optical Society	Universal Avionics	Wavelength Opto-Electronic Pte. Ltd
Strategic Systems, Inc.	The Phoenix Symphony	University of Advancing Technology	Waymo
Strategy1	The Port of Tucson	University of Arizona — Research, Innovation & Impact	WebPT
StratTech Solutions LLC	the revenue game, LLC	University of Arizona Applied Research Corporation	Wells Fargo Bank
Structured Communication Systems Inc	The Sensor Group LLC	University of Arizona College of Engineering	Westech Recyclers, Inc.
Sumo Logic	The Strategy Expert, LLC	University of Arizona Eller College of Management	Wexford Science + Technology
Sunbelt Medical Management	The Talent Store	University of Arizona Wyant College of Optical Sciences	Wilson's Ventures, LLC
Sundial Energy, Inc.	The Temp Connection	University of Arizona, Tech Launch Arizona	WipFli
Sunnyside Unified School District	theONswitch, LLC	University of Arizona, Tech Parks Arizona	WISPer Ventures
Sustaining Edge Solutions, Inc.	Thin Client Computing	University of Phoenix	Women's Business Center of Southern Arizona
SW Presentation Skills	TicketForce	UPS	Workiva
Swlftpage LLC	Tiempo Development	USA Federal Contracting Services, LLC	World Wide Technology
Swedish-American Chamber of Commerce Arizona	Times Microwave Systems	USAA	WSI-Optimized Web Solutions
Sysazzle, Inc.	Tolleson Union High School District #214	User10	Yarbrough Electronics Sales, Inc.
Systrends	TowerHunter	Vail School District	Yavapai College
Tallwave LLC	Town of Gilbert	Vail Unified School District	Yeager Marketing
Tangent Aviation, LLC	Town of Oro Valley	Valutek	YellowBird Holdings Inc.
Tanque Verde Unified School District	Town of Sahuarita	Vanguard Global Associates LLC	Yellowshark Group LLC
Techquity Advisors, LLC	Traction Point	Vantage West Credit Union	Zigi
TECHSTAFF	Trade in Motion LLC	VB Cosmetics, Inc.	Zinatt Technologies Inc.
TEKletics	Transact Campus Inc.	Veeya	Zovio
TEKsystems Global Services	Trego Integrated Systems	Vertech	Zuggand
Televerde	Triad Wireless, LLC	Vertica, a Micro Focus Company	
Tempe Chamber of Commerce	TriNet	VEYO	
Tesec Inc.	True Mobile Health	ViaWest Group	
TGen	Tucson Embedded Systems, Inc.	Victor Assad Strategic HR Consulting	
The Aerospace & Defense Forum	Tucson Federal Credit Union	VigilanteATI, Inc.	
The Arizona Group Insurance Brokers	Tucson Metropolitan Chamber of Commerce	VincentBenjamin	
The Carl and Klein Team	Tucson Unified Technology & Instruction	Vincit	
The Clements Agency, LLC	TuSimple	Virtuosity Consulting Group	
The Driven	U.S. Commercial Service	Vonage Business Solutions Group	
The Halpin Companies, Inc.	UA College of Architecture	VyaPay	
The KB Real Estate Group	UA Venture Capital, LLC	WachsField Technologies	
The Menlo Group Commercial Real Estate, LLC	UBS Financial	Waiver	
The Metal Man, Inc. / TMM Precision	UC Cloud Solutions Inc.	Wallace, Plese + Dreher, LLP	
The Neriah Group	UK Department for International Trade	Washington Technology Industry Association	

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PHOENIX

2800 N. Central Ave., Suite 1530
Phoenix, Arizona 85004
602.343.8324

TUCSON

1215 E. Pennsylvania St., Suite 122
Tucson, Arizona 85714
520.388.5761



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