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MARCH 23





BOTS ALUM CRUSHING IT and

sharing their success with BotsIQ and their alma mater. $\begin{tabular}{l} pg.5 \end{tabular}$



SAVE THE DATE for tee off in June.
Plan to play and sponsor. pg. 13

Area manufacturing apprentices tested their mettle with handson projects and a written exam in an annual contest of skill Friday, February 17, 2023.

Eight apprentices representing seven

CONTINUED ON PG. 2

ALSO IN THIS ISSUE:

- 3 LEGISLATIVE LUNCH AND LEARN
- 4 BOTSIQ VOLUNTEERS NEEDED
 - ALL ABOUT ENTREPRENEURIAL FELLOWSHIP
- 10 PREPPING YOUR BUSINESS TO SELL
- 12 LESSONS LEARNED: CHAPTER LEADERSHIP SUMMIT
- 14 SCHOLARSHIP NAMED IN MEMORIAM

PGH NTMA/MSC Apprentice Competition

CONTINUED FROM PG. 1

local manufacturing companies competed in The Annual PGH NTMA/MSC Apprentice Competition at Westmoreland's Advanced Technology Center.

The apprentices competed for the title of Best Metal-Working Apprentice in Southwestern Pennsylvania. The event has been an NTMA tradition for more than 30 years.

This year's event included a new Legislative Lunch & Learn session for area industry professionals. The event brought both manufacturing leaders and the future of the industry together for a day dedicated to the southwestern Pennsylvania manufacturing sector. (See page 3 for details.)

The competition began with a timed, written exam to assess knowledge. Each participant then moved on to the handson metal working portion of the competition where they were judged on the precision of both a manual mill part and a manual lathe part created from never-before-seen blueprints. They were supplied with a complete toolbox and material ready to create these machined





parts. Competitors were allotted four hours to fabricate each part. All final products will be inspected and scored by quality control inspectors from two member companies.

A point system based on knowledge, skill and efficiency determines the winner. The apprentice with the most points

We get the best of the best.

The apprentices who compete are skilled and knowledgeable—and make no doubt about it, they are there to challenge the competition and push themselves.

-- Liz Blashock, program coordinator

2023 PARTICIPATING APPRENTICES

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HAMILL MANUFACTURING COMPANY

CAMERON FOUSE
METPLAS, Inc.

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PENN STATE TOOL & DIE CORPORATION

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RICHARD SEREMBO
HAMILL MANUFACTURING COMPANY

TIMOTHY SHEFFLER
KISKI PRECISION INDUSTRIES

ZAIAH ZIEGER
JATCO MACHINE & TOOL CO., Inc.

will be named the winner at the annual Pittsburgh Chapter NTMA Apprentice Graduation Banquet in June at Stratigos Banquet Centre. The winner will also receive an H. Gerstner & Sons Toolbox.

We want to extend a special thank you to our sponsors:
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Community College, Alro Steel
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& Die Corporation, Hamill
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IMI PBM and Kurt J. Lesker
Company.

LEGISLATIVE LUNCH & LEARN

In conjunction with our annual PGH NTMA/MSC Apprentice Competition this year, the Pittsburgh Chapter NTMA tried something new: a Legislative Lunch & Learn spearheaded by our BotsIQ team. The event drew approximately 50 area manufacturing professionals to the Westmoreland Community College's Advanced Technology Center for the session.

The event opened with local legislators sharing the most upto-date information about the bills and policies impacting our industry. Representative Eric Nelson (R) member of the PA House Labor & Industry Committee and Representative Donna Oberlander (R) chair of the PA House Manufacturing Caucus, led the discussion.









Representative Eric Nelson

Attendees were briefed on the Pennsylvania Educational Improvement Tax Credit (EITC). Then attendees enjoyed a networking lunch followed by a tour of Westmoreland Community College's Advanced Technology Center and a first-hand look at the talented metalworkers at our Apprentice Competition.









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PRELIMINARY COMPETITIONS

Westmoreland - March 7th - 9th Robert Morris - March 14th & 15th FINALS COMPETITION

PennWest California - April 26th - 29th









Technical & Non-Technical Volunteers Needed.

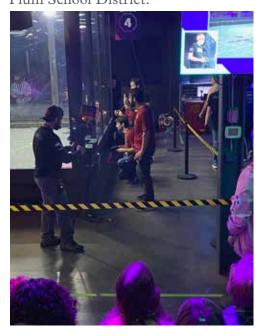
LEARN MORE AT

www.botsiqpa.org/volunteer-information

BotsIQ Alumni Give Back

by Michel Conklin, BotsIQ

BotsIQ's combat robotics program offers high school students an opportunity to experience manufacturing and it's no secret that the program impacts students. Last year, 98% of participants reported benefiting from BotsIQ. More than 10,000 youth have participated since its inception in 2005, including brothers Don and Joe Doerfler from Plum School District.



Don and Joe participated for a combined eight years (2008-2016) and played a significant role in Plum High School's success. During their time in BotsIQ, Plum received first place finishes in 2008, 2009, 2010, 2012, 2014, 2015, and 2016.

Following graduation, both Don and Joe attended the University of Pittsburgh and earned Mechanical Engineering degrees. While in college, they continued participating in combat robotics through the National Robotics League (NRL) hosted by the NTMA. Often, BotsIQ teams faced the brothers in the NRL

National Competition.

Today, Don and Joe work at local companies (Schroeder Industries and NTMA member F.S. Elliott, respectively), but combat robotics continues to play a significant role in their life. Both compete in the 250-pound division on Battlebots Team Huge, airing weekly on the Discovery Channel, and in the Norwalk Havoc Robot League (NHRL) in several weight classes. Through the NHRL, Plum Robotics Club received a huge donation.

Don and Joe qualified for the NHRL World Championship last December. As an incentive for the teams to win, the NHRL committed a sizeable donation on behalf of the champions to a STEM charity of their choice. After grueling battles, Joe made it to the final round. He faced off against another BotsIQ alumni, Kris Rummel (Admiral Peary AVTS).

Joe won the first battle, but because the tournament is double elimination, they needed to battle again.
Before they entered the arena, the two competitors decided to split the winnings between their two charities, ensuring that both organizations would benefit, regardless of the outcome.

Joe ended up securing the win and was named champion. Plum Robotics received its largest donation to date, \$62,500! This funding has helped the team to buy 3D printers, tools, and materials in the short term, but will sustain the growth of the



program for many years to come.

BotsIQ is so thankful its program has a chance to engage so many youth and is grateful for generous alumni who foster these opportunities for future members.



BotsIQ Hosts 2nd Annual Girls Exploring Engineering Day

Creativity. Curiosity. Teamwork. Support. Opportunity. These words were the core of conversations and activities during BotsIQ's second annual Girls Exploring Engineering Day. On Wednesday, February 22, 2023, BotsIQ celebrated DiscoverE Girl Day during National Engineers Week in collaboration with Women in Manufacturing (WiM) Western PA Chapter. More than 150 middle and high school girls from across Southwestern PA convened at Commonwealth Charter Academy's TechWorks. Industry professionals inspired the next generation of women by leading hands-on activities, offering mentorship and teaching about the life-changing work achieved by engineers.

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To kick off the event, girls heard from inspirational female presenters in a virtual/inperson session led by WiM. They spent the rest of the day participating in technical and creative handson activities that included



soldering, writing code for an on-site tabletop CNC mill, creating structures with 3D pens, operating cobot arms and much more.

Besides experiencing new skills and engaging in engineering challenges, the girls also had the opportunity to spend time with exhibitors to

learn about new manufacturing technologies and how to use power tools. Participants talked with local post secondary recruiters and witnessed exciting robotics demonstrations.

The day would not have been complete without a networking lunch session. In small groups, girls had the opportunity to speak with current engineering students and professional engineers.



"From soldering to building a bridge, I did it all today- I can see engineering being my future."

—Student Participant

A DAY FOR INDUSTRY PROFESSIONALS TO INSPIRE THE NEXT GENERATION OF WOMEN.

by JoAnna Dehler, BotsIQ

The "Chat With Change Makers" session highlighted five messages:

Engineers...

- Channel their curiosity to imagine the future
- Utilize on-the-job creativity
- Foster teamwork to innovate and create
- Pursue important work through empowerment
- Make a difference by creating things that matter.

Students and volunteers alike left the day feeling connected, accomplished and inspired.

BotsIQ serves the Southwestern Pennsylvania region by providing pathways to expose young people to careers in manufacturing. Engineering is just one element of manufacturing. This workforce development nonprofit aims to tackle challenges and inspire girls to pursue this field. The workforce







is changing, and we need women in robotics and manufacturing! Girls Exploring Engineering Day is just the beginning of BotsIQ's plan to engage women in manufacturing opportunities. Stay tuned, because Girls Exploring Tech is right around the corner.

BotsIQ would like to thank all of the schools, companies and amazing women that worked very hard to expose so many girls to engineering and manufacturing pathways.

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IEE Entrepreneurial Fellows Class

by Kevin Hartford, PGH NTMA/NTMF President

YOUR NTMA MEMBERSHIP MAKES YOU ELIGIBLE FOR THIS VALUABLE EXPERIENCE.

Seventeen years ago, I was fortunate enough to be invited to become a fellow in one of the University of Pittsburgh's IEE Programs, the Entrepreneurial Fellows Class (EFC) of 2006. With Pitt being my Alma Mater, I was both interested and excited about this opportunity. What followed was a unique learning and growth opportunity which I had not expected, but which I took full advantage of.

Fortunately, when the Entrepreneurial Fellows Class chooses fellows for its annual class, they choose people from a variety of industries. My class of approximately 20 fellows had a wide range of industrial classifications. But, what we all had in common was that we were owners/executives/managers of small and/or family-owned businesses. I found that to be very helpful. It gave me the opportunity to compare notes, exchange ideas and share insights with a small group of very bright, like-minded people who had similar values, concerns and challenges.

One of the other attractive aspects of the program, it was not all consuming. We met one day a month for an

entire day. So, while we were there our class was totally focused on the subject at hand. Honestly, it was a welcomed escape from the daily grind all of us had. And, the two locations were first class venues: The Duquesne Club and The Rivers Club. Not only are they beautiful Pittsburgh

For information on admission requirements, application procedures, and contact information, please visit:

entrepreneur.pitt.edu/efc

clubs, but they give a sense of importance and history.

Finally, the instructors were excellent. Each class had its own instructor that was an expert in a particular subject area. For example, our finance instructor Bob Hogan used to be a banker in Seattle. He shared a tremendous story that showed how much times have changed, as well as our values. It was a class I will never forget. I'll refrain from sharing the story in case anyone reading this decides to sign up for the EFC. Bob also would take the time to review your P&L and balance sheet. He was very willing and eager to provide us with financial advice.

The IEE Administration couldn't have been more helpful and caring. In fact, we found our new bank/banker with the help of Ray Vargo who has been with the IEE for over 20 years. Changing banks was such



a positive paradigm shift for us that it gave us the boost we needed to rapidly meet a new level of growth, opportunity and financial freedom.

The current curriculum and schedule is below. I think you'll be impressed with its content.

It's been 17 years since I graduated from the program. When I became a Fellow I was assigned a mentor. His name is John Bitzer. At the time, John was the CEO of a third generation family-owned business called ABARTA. Today, John is one of my best friends and we get together for golf, lunch and dinner on a frequent basis. Ironically both of us retired right around the same time.

I highly recommend the EFC and all that the IEE has to offer. I believe so strongly in the institution that I became an IEE board member last year. It is a tremendous resource for Pittsburgh and Southwestern PA.

2023 GLASS SCHEDULE

JANUARY

Building a Strategic Foundation is the Key to Success February

Moving from Strategic Planning to Implementation

Financial Metrics and Dashboards that Work

Leadership Competency: Practices and Styles

MAY Building and Growing Your Dream Team

Building and Growing Your Dream leam

Diversity and Inclusion: The Competitive Advantage
September

Legal Overview: Keep Your Business Running Smoothly October

Developing the Ultimate Sales Machine

November

Marketing and Beyond: Setting Your Strategy Apart
December

Technology Management & Decision Making

Nate Thomas, JATCO Mold & Tool Co., Inc., '22 Fellow Shares His Experience...

WHAT DID YOU ANTICIPATE, AND WAS IT WHAT YOU EXPECTED?

My anticipation going into the program was that it was going to be above me and I was not going to be in the same league professionally as my classmates would be. Looking back, that is not the case at all. Every one of my classmates was unique in their personal and professional lives. Everyone was there, I believe, to make their businesses and workplaces thrive even more.

WHAT HAS BEEN THE BIGGEST TAKE AWAY FOR YOU PROFESSIONALLY?

The IEE is a great asset. The people involved, both present and past, are there to help and guide you more than I realized going into the program. The network of people involved in this program is quite impressive.

What has been the biggest take away personally?

I am proud of completing the program. I have gained a lot of knowledge in a short amount of time. But, my biggest take away is that the program reminded me that I'm not the only one in my position of trying to make a business sustainable and successful and that I am capable of doing it.

How will your participation impact you long term?

I believe that the connections I've made in the program as well as the insight into the planning and decision making processes will help me to continue to grow both personally and professionally going forward. That in turn will help my company progress into the next generation.

Is there anything else you'd like to add?

After 25 years, the program speaks for itself. If you are going into leadership roles within your company this program is a great tool for you. As for someone that is out starting their own business, it would also be a great experience not only for the knowledge you obtain but also joining a network that can guide you on your journey could be invaluable.

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Preparing to Sell Your Business?

The current economic climate has many owners and executive teams of lower and middle market companies considering exit opportunities. Many exit opportunities consist of an acquisition by a strategic buyer/competitor or a private equity backed transaction. Acquisitions by these buyers may result in either a sale of all of the owners' equity holdings in the to-be-acquired company or substantially all of the assets of the company. Prior to engaging in any of these transactions or even executing a Letter of Intent to sell your company, the company should undergo some general organizational housekeeping before entering any transaction.

The following items are basic areas of review that may require some "housekeeping" prior to entering into a sale transaction:

Governance Documents: Depending on whether your company is a corporation or limited liability company, your company should maintain up to date versions of (i) its certificate of incorporation or

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Legal services may be performed by other lawyers at the firm.

organization, (ii) bylaws or LLC Agreement/Operating Agreement, (iii) stock certificates and membership certificates (if certificated), and (iv) shareholders agreement (if applicable). Sometimes there may be additional governance documents for corporations depending on whether the company engaged in various forms or debt and equity financings. All of these documents should be kept in the company's record book.

Meeting Minutes and Consents: Meeting minutes and consents of the company's directors and shareholders (or in context of an LLC—the managers and members) act as an official narrative of the company's actions. By law, most companies organized as a corporation are required to have an annual meeting and keep adequate meeting records. Most third-party buyers will want to see that all major actions (or actions requiring board or owner approvals) were properly approved by the company and acted in accordance with any restrictions set forth in the company's governance documents and/or third-party arrangements. The lack of proper approvals through meetings or consents may cause company stakeholders and future purchasers to question whether the company had proper authority to engage in certain actions.

Financial Matters: A company should always have the following up to date records (i) the company's equity and debt ownership structure in the form of a capitalization table, (ii) financial statements including a balance sheet, income statement, and statement of cash flows, and (iii) all federal, state, and local tax filings for at least the last 10 years. Also, please note that some states require yearly franchise fees in order to maintain the company's good standing status. Ensure that your company is up-to-date on franchise fees.

Governmental Filings/ Permits: The company should maintain up-to-date permits depending on state and local rules and the type of business the company operates. Certain companies may be required to maintain local business operating permits/licenses, environmental permits (i.e. air and water permits) and professional licenses. The absence of any of these licenses may have adverse consequences to the operations of your business and on the potential sale of your company.

by Edward Grattan, Frost Brown Todd LLC

Material Agreements: All companies should maintain written agreements with all major customers, suppliers and vendors regardless of industry and frequency of purchase. These agreements may be memorialized in the form of master services or a supply agreement, or they may be in the form of a purchase order that incorporates written or online terms and conditions. Additionally, your company should maintain (i) personnel records (i.e., employment agreements, offer letters, employee handbooks, and confidentiality agreements), (ii) any formal benefits plans in the form of general health and wellness plans, equity incentive plans and retirement plans, and (iii) insurance policies such as general liability, workers' compensation, directors and officers, cyber security and automotive. Maintaining these records will help a third-party purchaser evaluate risk and assist in developing a proper valuation of your company in connection with a sale transaction.

Real and Intellectual Property; Equipment: Your company should maintain records of all leases or title records to all real estate involved in operations and any major pieces of equipment or vehicles. Additionally, the company should maintain protections in relation to the use of its name, logo, trade secrets or patents through either proper government filings or confidentiality assignment of works agreements with its employees and third-party vendors.

The foregoing six topics will encompass a substantial part of a potential purchaser's legal due diligence. A disorganized house may cause devaluation and other legal issues along with higher costs upon your exit from the company. If you are thinking of selling your business, the earlier you are able to organize your business in relation to the forgoing items, the easier it will be to identify and remedy issues and facilitate a sale transaction at a lower legal cost.



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LESSONS LEARNED: NTMA CHAPTER LEADERSHIP SUMMIT

I had the privilege of representing the Pittsburgh Chapter at the NTMA Leadership Conference in Albuquerque New Mexico in late January. The event proved to be enjoyable and enlightening. Thank you to Roger Akins and his team at NTMA National for hosting and facilitating the conference. We had 47 NTMA members from 18 chapters participate throughout the country. This was my first conference in eight years, so I enjoyed meeting a lot of new people. These folks share the same values as all of us in the Pittsburgh Chapter. These manufacturers take great pride in their

work and relish being on the cutting edge of manufacturing technology. **Noteworthy News from NTMA National:**

- There are 21 new members and we have experienced the lowest decline in members in 10 years.
- Thirteen of our 32 Chapters experienced positive growth in the past year.
- The National goal for 2023 is to bring in one new member per chapter.
- While it was a good year for National, the overall membership has decreased over the past 10 years by 25 percent.

Reasons Companies Leave NTMA:

- 20% sold
- 30% didn't use services
- 45% left for financial reasons.

I made it a point to keep a low profile and to learn as much as I could about the other chapters and NTMA National. Many of the chapters represented at the conference are facing the same challenges and issues we did many years ago. They are trying to grow their chapter, develop their workforce and create value for their members.

I did engage in one-on-one conversations with several of the

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by Kevin Hartford, PGH NTMA/NTMF President

attendees and share the programs we have and how we've implemented them. During these conversations I realized and greatly appreciated how far the Pittsburgh Chapter has come and how much we've accomplished in the past 15 years.

I came away with a lot of thoughts and ideas. The NTMA is a tremendous association and I'm proud to be a member for 18 years and counting. I strongly believe that the Pittsburgh Chapter, which is still the second largest chapter in the country, can greatly help our sister chapters. With that in mind I am

going to propose to NTMA National that the next Leadership Conference take place here in Pittsburgh. It would enable the other chapters to meet our members, witness first hand what we're doing and how we're doing it. I've already discussed this with our board and they are in favor of it. Speaking of our board, I've always said that the Pittsburgh Chapter board is the best board I have ever been a part of. It is proactive and dynamic. The board has changed over the years, but the core group still remains and the leadership they provide has proven to be invaluable. Other chapters can learn a great deal

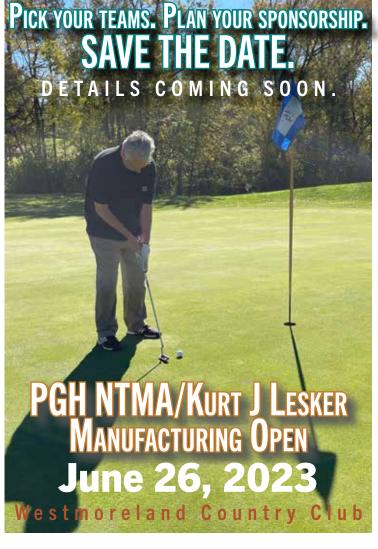
from our board and I'm proud to facilitate that.

However, our underlying strength is our staff and our committees. From Phyllis Miller, Liz Blashock and the Apprenticeship Steering Committee to Michel Conklin and our workforce development BotsIQ Team. It's the committees and teams that make it happen. It's because of all of their hard work and dedication that we have experienced so much success. So when you see them at one of our functions please thank them for all they do. They are elite!

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PGH NTMA Scholarship Named in Memory of Longtime Manufacturer, Supporter and Friend, Jim Boyle



Jim Boyle founded Boyle Inc, a tool and die company specializing in precision grinding and machining of carbide to support the high-speed stamping industry.

For almost 30 years, Mr. Boyle served on the Board of the Pittsburgh Chapter National Tooling

& Machining Association. Given his extensive international business career, Mr. Boyle was passionate about the role that manufacturing plays in our country's future and the higher calling of its role in securing our global strategic position. He enjoyed speaking at numerous high school career fairs and was especially determined to educate youth in western Pennsylvania about the rewards of a manufacturing career.

In honor of Mr. Boyle, one \$1,000 scholarship will be awarded to a 2023 BotsIQ graduating senior from the Pittsburgh Chapter National Tooling & Machining Foundation. The recipient may use the funds toward their educational training or purchasing of tools for a career in manufacturing, the trades or engineering.

Interested students should submit their application by April 15, 2023. For details, please contact: Michel Conklin at 412-213-8486 or conklin@botsiqpa.com.

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Mark Your Calendar and Plan to Join us at a 2023 Bots IQ Event

PRELIMS: March 8 & 9 Westmoreland Co. Community College; March 14 & 15 Robert Morris University FINALS: April 28 WestPenn California

Pictured right: While our competitors ready themselves for battle, our team is restoring the arena that takes a beating each year.

Below: Design and construction win battles, but names create identity.

2023 Bot Names:

Where Combat meets Creativity

Be on the look out for some inventive names at this year's competition. You may see:

- The Paperweight by Central Westmoreland CTC
- Klondike by Clairton HS
- The Cheese Grater by Deer Lakes HS
- Grease Lightning by Freeport Area Senior HS
- The Rock Em Sock Em Knight by Knoch HS
- Butterfingers by Penns Valley Jr/Sr HS
- Space Whale by Punxsutawney Area HS
- Dwayne "Da Bot" Johnson by Seneca Valley Senior HS







PGH NTMA CALENDAR:

3/08	Westmoreland/Fayette Mfg. Industry Partnership
3/08 & 09	${\bf BotsIQPrelims-WestmorelandCo.Comm.College}$
3/14 & 15	BotsIQ Prelims - Robert Morris University
3/21	NTMA Apprentice Steering Committee
4/28	BotsIQ Finals - PennWest California
4/28	Haas/BotsIQ Networking Event
5/04	NTMA/NTMF Board Meeting
6/07	NTMA Apprentice Steering Committee
6/07	NTMA Apprentice Graduation
6/26	PGH NTMA/Kurt J Lesker Manufacturing Open

For times, locations and details, please visit:

www.PGHNTMA.org