



ANNUAL REPORT

FY 2016

Dear IFAI Members,

Welcome to the Annual Report of your association. As an owner of IFAI, you have a vested interest in what your organization has accomplished. We are pleased to report to you some of what happened in the 2016 fiscal year, (June 2015 through May 2016).

Here are just a few of the exciting highlights

- The first-ever Smart Fabrics Summit was held in Washington DC in coordination with the US Department of Commerce, featuring a panel discussion lead by US Secretary of Commerce, Penny Pritzker.
- There were 22% more attendees at IFAI Expo 2015 in Anaheim, California than the previous year.
- Member retention averaged 88%, the highest retention rate in recent history, thanks to our ever improving membership proposition.
- In January, the Marine Fabricators Association Conference more than doubled – that’s right, MORE THAN DOUBLED their attendance over the previous year’s event! This is the highest number of participants ever recorded for this event.
- Members reported satisfaction of 4.0 on a 5 point scale, and 91% rated the level of cooperation with Divisions as “Excellent, Good or Improving” in the bi-annual membership survey.

With the inspired leadership of your IFAI Board of Directors, your association is investing in the future. Your staff is professional and eager to help you, our valued member, succeed. Our financial position is stronger than it’s ever been. IFAI has more than \$2.5M in retained earnings and is investing in programming, technology and tools to better serve your needs.

This is a great time to get involved in IFAI and reap the benefits of networking, information and life-long friendships. If you’re not a member, you’ve been missing out. Join now. If you are a member, volunteer to work on a board or with a committee. We are so much stronger together and your association needs engaged and active members to help us shape a strong and profitable business climate.

We have challenged our staff to be member-centric, to think about how we are adding value and increasing member satisfaction in everything we do, and we have a challenge for you, as well. Volunteer to join a Division Board or a committee. We are so sure that you will find value in IFAI that if after one year you have not benefited personally and professionally by your participation, we will refund your dues for the previous year.

Thank you for your support of IFAI. We are eager to please and love to hear feedback and ideas. I answer my phone and I enjoy hearing from members. Call me at the number below and let’s chat!



Mary Hennessy
President and CEO, IFAI
Phone: +1 651 225 6986





IFAI's Market Segments – What They Mean

IFAI exists to help the textile industry grow. For over one hundred years, we've provided direct support to the industry, advocated in governmental circles, brought people together and helped businesses prosper through networking, trade shows and information sharing.

In recent years, we've realized that as the industry changes on a daily basis, we need to change right along with it. What worked yesterday might not work today and what's new today might help you tomorrow. We have to be flexible, so our members can succeed.

That's why we divided IFAI's thirteen divisions and three country sectors into four market segments. These groups make us more nimble – allowing us to provide more direct support through our publications and events.

In this publication, we'll divide up our division reports by **market segment**, and show you how IFAI supports member companies in each part of our evolving and changing industry. You'll see how it all fits together under the larger umbrella of Industrial Fabrics Association International.

IFAI Market Segments

Advanced Textiles (Advanced Textiles, Narrow Fabrics Institute, Military, U.S. Industrial Fabrics Institute) —The Advanced Textiles market segment serves those divisions which deal primarily with technology and specialty fabrics – covering markets such as safety, medical, interactive, military, new technology, specifications, testing and much more. The new “smart” fabrics find a home in Advanced Textiles as well.

Shade and Weather Protection (Fabrics Structures Association, Professional Awning Manufacturers Association, Tent Rental Division)—This market segment supports those divisions which encourage the use of fabric structures, including awnings and other shade products, by architects, engineers, suppliers, fabricators and private users.

Specialty Fabrics (Equipment Division, Fabric Graphics Association, Marine Fabricators Association, Tarp Association)—The Specialty Fabrics segment is for those divisions and their members who supply and manufacture traditional market products from fabric, equipment and hardware to services needed to manufacture end products. These specialty fabrics include nautical interior and exterior items and tarps of virtually every kind.

Geosynthetics (Geosynthetic Materials Association)—The field of geosynthetics, which involves the use of textiles and textile products in civil and mechanical engineering, is one of the fastest-growing in the industry. This market segment supports those members located throughout the supply chain dedicated to this highly specialized market.

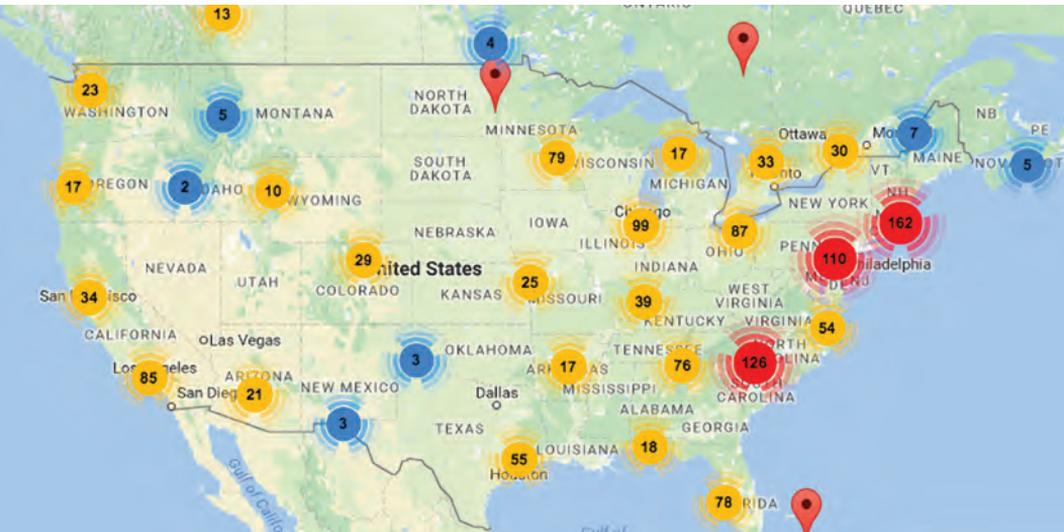
Wherever You Go, There We Are

Find an IFAI member through our worldwide online directory

One of the greatest benefits of belonging to an association is the ability to network. As part of our ongoing technology and website upgrade, IFAI has developed a new tool that will help any user find any IFAI member worldwide.

Our online Member Directory, powered by Google Maps, allows the user to sort by location, market segment, division and IFAI Buyer's Guide listing topics.

Membership means IFAI members worldwide can do business with you with just one click.



Visit IFAI.com, click on the Membership menu and select Member Directory.

OUTLOOK Conference

The Outlook Conference is the textile industry's leading roundtable gathering place. Each year, the U.S. Industrial Fabrics Institute and Narrow Fabrics Institute sponsor the conference, which features legislative updates, regulatory information, networking and C-level discussions about the industry for the coming year. It's not to be missed.

SMART FABRICS Summit

The Smart Fabrics Summit, held for the first time in 2016, was a joint venture between IFAI and the United States Department of Commerce's Office of Textiles and Apparel (OTEXA). Held in Washington, D.C., the Summit features market reports, industry analysis, product demonstrations and a forum moderated by United States Commerce Secretary Penny Pritzker.



Advanced Textiles

197 members

- Sponsored Advanced Textiles testing booth at 2015 IFAI Expo
- Launched highly popular "Fire Retardancy" Webinar Series (six in series), which is moderated by Haskell Beckham, PhD, Exponent
- Developed webinar series for use in 2017, including Understanding Social Media, ATP Division Benefits, and Technical Textiles 101
- Sponsored annual Student Design Challenge to provide a limelight for rising stars in the industry; in 12th year of challenge award
- Launched new "Advanced Textiles" category as part of International Achievement Awards
- Played a key role in launching high-profile Smart Fabrics Summit

IFAI.com/AdvancedTextiles



Military Division

56 members

- Sponsored MUST (Military Uniform System Technology) program, an R&D program that works to improve the supply chain processes within the Military uniform and equipment industry
- Gained added visibility with booth at the Association of the United States Army (AUSA) tradeshow
- Developed half-day programing materials for upcoming Outlook 2017

IFAI.com/Military

AT Source is the voice of the Advanced Textiles market. An online publication, this newsletter points readers to the hot spots in the industry with timely, accurate and informative articles that help businesses grow.

The Advanced Textiles Conference is the fastest-growing event at Expo. Each year, professionals from the industry gather for education tracks, networking and the annual Advanced Textiles Reception. It's a tremendous way to immerse yourself in an important area of the industry.



Narrow Fabrics Institute

63 members

- Serve as industry sales agent for abrasion rods (also referred to as hex rods) for testing seatbelt abrasion resistance as stated in 49 CFR 571.209-Standard No. 209; and for testing webbing abrasion resistance as stated in ASTM D6770, Section 6.1.2.

Accomplishments from NFI & USIFI's partnership:

- Opposed the Free Trade Zone requests that when against member interests
- Co-authored a letter in support of amendments offered by Senator Kelly Ayotte (SA 1961 and SA 1962) to the FY 2016 National Defense Authorization Act (H.R. 1735) to fix the threshold to trigger the Kissell Amendment at \$150,000 and fix the threshold to trigger the Berry Amendment and its specialty metal variant at \$150,000.

IFAI.com/NarrowFabrics



US Industrial Fabrics Institute

82 members

Accomplishments from NFI & USIFI's partnership:

- Presented two government relations webinars in preparation for Lobby Days 2015
- Hosted USIFI/NFI Lobby days in June 2015 with 27 attendees
- Held the Outlook Conference in May 2016 at Hilton Head Island, South Carolina
- The Berry Amendment Textile Coalition organized a textile/metals/labor coalition to strike Section 807 of the FY 2017 National Defense Authorization Act (H.R. 4909) bill to preserve the Berry Amendment.
- Defeated a determined effort to weaken the Berry Amendment during congressional consideration of the FY 2016 National Defense Authorization Act through the Berry Amendment Textile Coalition.

IFAI.com/USIndustrialFabrics

EXPO

The industry's 'show of record' brings hundreds of exhibitors and thousands of attendees to venues around the United States for three days which provide a complete look at the textile industry. Specialty Fabrics are perhaps the largest part of Expo, with the majority of the event's exhibitors and attendees gathering for education pertaining to this market segment.

marine FABRICATOR

This bi-monthly publication is dedicated to custom canvas professionals and the intricate, exacting work they do. Marine fabric craftsmanship is truly an art and IFAI proudly supports the work of this industry through the official publication of the Marine Fabricators Association.



Equipment Division

60 members

- Focused programming on training and division partnerships to create workshops
- Developed Sewing Maintenance Workshop in partnership with PAMA and MFA to offer hands-on education and training for sewing machine operators
- Launched Cutting & Welding education workshops in April 2016
- Sponsored EQP Workshops at IFAI Expo 2015, which included 15 exhibitors and 2 new members
- Facilitated programming board discussions for EQP members

IFAI.com/Equipment



Fabric Graphics Association

81 members

- Hosted "Awning, Graphics and Structures tour" at the 2015 IFAI Expo in partnership with the Fabric Structures Association, Professional Awning Manufacturers Association, and Tarp Association
- Awarded Student Design Competition
- Hosted several webinars including: "FGA Fire Standards" webinar series, "Latex Printing", "Wall Coverings", "Silicone Edge Graphics", and "the State of the U.S./Canadian Fabric Graphics Market"

IFAI.com/FabricGraphics



The Marine Fabricators Association sponsors this important event, which helps division members grow business through education. From business strategies to design concepts and canvas innovations, the Marine Conference is a well-respected event with proven impact on the bottom lines of attendees.

Specialty Fabrics REVIEW

There's only one Review. Since 1915, IFAI's flagship publication has chronicled the entire industry through features, education, trends and information in what truly is the textile industry's publication of record.



Marine Fabricators Association

269 members

- Hosted Marine Fabricators Conference in January 2016 with record-setting attendance numbers
- MFA introduced first virtual seminar, which included live-streaming and video presentation on 3D CAD Design at Marine Fabricators Conference 2016
- Sponsored popular Annual Fabrication Excellence competition with 110 projects entered
- Hosted three regional workshops, which drew in total 133 attendees and 49 exhibitors
- Updated upholstery section in 2016 MFA Time Standards Manual to serve as a benchmark shop owners can use to set fabrication times
- Revised MFC Marine Exterior Test

IFAI.com/Marine



Tarp Association

102 members

- Hosted successful "awning, graphics and structures tour" at the 2015 IFAI Expo in partnership with other IFAI divisions *see FGA
- Informed trade show participants on state and federal truck-cover laws at Mid-America Trucking Shows by;
 - distributing 45 directories and 25 Truck Covering Laws at 2015 show
 - distributing nearly 150 directories and 45 Truck Covering Laws at 2016 show
- Held Tarp Repair Class at 2015 and 2016 Mid-America Trucking Show
- Hosted "How to hit the profit zone" webinar

IFAI.com/Tarp

FABRIC ARCHITECTURE

This is the official publication of the Professional Awning Manufacturers Association (PAMA) and the Fabric Structures Association (FSA). Published annually, Fabric Architecture is devoted to promoting the benefits of fabric as an innovative building material.

IFAI tent Conference

Held every two years, Tent Conference is the primary place for the shade and weather protection industries to gather for seminars, education tracks and networking. IFAI supports the industry through this event and the Tent Expo, which is held in even-numbered years. The 2016 Tent Conference was held at Westgate Las Vegas Resort and Casino.



Fabric Structures Association

167 members

- Taught 20 American Institute of Architects Continuing Education Courses
- Provided 4 hours of AIA/CEU credit programming and 2 hours of additional fabric structures education (including presentation of the North American Building Code Matrix) at the 2015 IFAI Expo
- Hosted successful "awning, graphics and structures tour" at the 2015 IFAI Expo in partnership with other IFAI divisions *see FGA
- Upgraded American Institute of Architects membership level for ability to teach courses internationally and online
- Offered Student Design Challenge for second year
- Partnered with Professional Awning Manufacturers Association to create an Educate the Educators Conference specific to fabric structures and awnings

IFAI.com/FabricStructures



Tent Rental Division

280 members

- Hosted Tent Conference 2016 in Las Vegas, NV which garnered more than 100 attendees and 22 sponsors
- Hosted boot camp training sessions for California Rental Association Show, Stony Brook University Code Conference, and Eugene OR Fire Training Facility.
- Submitted four proposals for changes in codes that relate to tent installation, plus an appendix proposal, as part of the Group B I-Code Development Cycle for the 2018 Model Code at the International Fire Code/ International Code Council Committee Action Hearing held in Louisville, KY
- Engaged in non-engineered tent study with Clemson University
- Conducted further testing for the ballasting study

IFAI.com/Tent

intents

IFAI supports the Shade and Weather Protection segment through this bi-monthly publication, dedicated to those who stage and host safe, successful tented events. Informative articles, industry news, trend reporting and features make this publication a strong advocate for an important and fashionable industry.

IFAI EXPO Shade and Weather

As is the case with IFAI's other market segments, Shade and Weather Protection has a strong presence at the annual IFAI Expo. Exhibitors, education offerings, speakers, new product displays and of course, unbeatable networking are just a few ways Expo supports the shade industry.



Professional Awning Manufacturers

313 members

- Upgraded membership level of PAMA's exclusive Architect Education Program to teach courses internationally and online
- Taught 25 American Institute of Architects Continuing Education Courses
- Provided education at five Zone Conferences
- Created code committee and attended International Code Council Committee Action Hearings in Louisville, Ky.
- Active in the Attachments Energy Rating Council (AERC)
- Continued development of the awning time standards manual
- Announced new PAMA Student Design Challenge for the 2016 school year
- Partnered with Fabric Structures Association to create upcoming Educate the Educators Conference

IFAI.com/Awnings



2016 IFAI
INTERNATIONAL
ACHIEVEMENT
AWARDS

Awards and Honors

The International Achievement Awards (IAA) and Industrial Fabrics Foundation (IFF) Innovation Award set the standard for excellence in a wide range of categories and disciplines. Awarded each year at IFAI Expo, these honors are highly sought-after and continue to pace the industry.

Geosynthetics

This bi-monthly publication is devoted to advancing this fast-growing market segment. Whether it's products, services or applications you're looking for, and whether you're an engineer, distributor, contractor or developer, you'll find everything you need in Geosynthetics. It's expressly designed with professionals in mind and is a powerful advocate for the geosynthetics field.

Geotechnical Frontiers

Held every six years, Geotechnical Frontiers is the place to be for anyone interested in either the geosynthetic industry or growing a business related to it. Co-organized by our Geosynthetic Materials Association and the Geo-Institute, IFAI took the lead in 2015 in helping support this event. Our Call for Presenters received record attention, attracting over 900 interested parties.



Geosynthetic Materials Division

167 members

- Successfully advocated for geosynthetics language to be included in the new 5-year transportation law called "FAST Act" (Fixing America's Surface Transportation)
- Presented "2016 GMA Leader of the Year Award" to U.S. Rep. Chuck Fleischmann (R-Tenn.) for introducing the geosynthetic amendment
- Ramped up the divisions 2016 federal and state lobbying efforts
- Built new relationships (through Federal lobbying efforts) with Federal Aviation Administration, Federal Highway Administration, U.S. Department of Transportation and U.S. Department of Commerce
- National Transportation Product Evaluation Program (NTPEP) efforts include: attending 2016 Annual Meeting, testing/converter audit, REGEO full audit program, Geogrid specification for subgrade stabilization, and Geotextile and erosion control meetings at NTPEP annual meeting
- Congressional visits included Spring Lobby Days in April 2016
- Educational efforts included WCSD Technical Seminar in March 2015

IFAI.com/Geosynthetics



Makers Division

58 members

Continued partnership with Makers Coalition Foundation, with the goal of developing nationwide workforce development initiatives

- Awarded grant from the Industrial Fabrics Foundation
- Acquired “Sewing Machine Operators” curriculum to educate future members and support building a vibrant, highly skilled workforce
- Working towards Department of Labor “Industry Apprentice” designation as first step toward helping build the industry’s future workforce
- Five educational organizations are implementing our sewing program in California, Texas, Minnesota, Wisconsin, and Pennsylvania
- In process of developing online jobs, contract sewing and internship board to revitalize future industry growth

IFAI.com/Makers

Membership Survey Results

Here are some highlights from IFAI’s biennial Membership Survey:

- Our “Membership Satisfaction Score” reached an all-time high of 4.0 on a five-point scale
- 91 percent of respondents see the relationship with our divisions as “improving, good or excellent”
- 88 percent of respondents plan to renew their memberships
- 80 percent of respondents would recommend IFAI to a colleague

Thank you for supporting your association!



IFAI Canada
Division



IFAI New Zealand
Country Sector



IFAI Japan
Country Sector

IFAI Canada and IFAI’s Japan and New Zealand country sectors exist to advance the industry in these countries. The IFAI Canada Division represents the Canadian specialty fabrics industry. IFAI Japan represents the Japanese specialty fabrics industry. The Outdoor Fabrics Products Association of New Zealand (OFPANZ) represents the specialty fabrics industry in New Zealand.

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Custom Marine Canvas

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United States Industrial Fabrics Institute

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*BondCote Corporation, A Heytex
Group Company*

Vice Chair, Jim Egan
Graniteville Specialty Fabrics

Consolidated Statements of Financial Position

May 31, 2016 and 2015

ASSETS	2016	2015
CURRENT ASSETS:		
Cash and cash equivalents	\$452,469	\$839,390
Investments	\$3,584,863	\$3,799,291
Accounts receivable, net	\$448,454	\$455,771
Inventory	\$25,905	\$8,019
Prepaid expenses	\$325,608	\$189,189
Income tax receivable	\$0	\$25,062
Deferred tax asset	\$67,400	\$63,802
Total current assets	\$4,904,699	\$5,380,524
Property and equipment, net	\$2,401,867	\$1,903,808
Other assets	\$400	\$9,980
TOTAL ASSETS	\$7,306,966	\$7,294,312
Liabilities and Net Assets		
CURRENT LIABILITIES:		
Accounts payable	\$308,245	\$285,463
Accrued expenses	\$357,999	\$381,579
Deferred revenue	\$4,091,426	\$3,807,717
Total current liabilities	\$4,757,670	\$4,474,759
Net assets-unrestricted	\$2,549,296	\$2,819,553
TOTAL LIABILITIES AND NET ASSETS	\$7,306,966	\$7,294,312

