

2022 ANNUAL REPORT



**MERCHANTS
EXCHANGE**

Message from the Executive Director



On behalf of the Merchants Exchange Board of Directors and the staff, I am pleased to present the 2022 Merchants Exchange Annual Report. I initiated this Annual Report tradition in 1998 to inform our members, highlight our services, and report out on our financial position. Since then, I have watched the Annual Report evolve over the last 26 years into an annual opportunity to recognize our members, client associations, Board of Directors, and the projects and endeavors of the Merchants Exchange staff. Included in this Annual Report is an update of our current Five-Year Strategic Plan Action Initiatives and our Financial Statement for the year ending December 2022, prepared by our Certified Public Accountant.

2022 was member-focused and backed by a strong staff team.

"LOOKING FORWARD AND LOOKING BACK: THE FUTURE OF THE MERCHANTS EXCHANGE"

I began my tenure at the Exchange on July 1, 1997 and have led the organization as Executive Director for the last 27 years. I am proud of the work we have done to become a modern, highly respected, sustainable organization recognized not only as a community partner, but as an essential piece of the maritime transportation infrastructure on the Columbia River. The last three years especially have been full of challenges relating to the global health crisis of COVID-19 but also full of opportunity. Through it all, our Merchants Exchange staff worked together as a team to maintain our 24/7/365 presence, overcome challenges, adapt to the ever-changing "new normal", and continue to provide our members with the excellence of service they expect. Our commitment to the Columbia River remains as steadfast today as it was when the Exchange launched 144 years ago.

This Legacy of Service – to our members, our community, and our industry – is the core of our work at the Merchants Exchange. Despite the challenges and adaptations required as we moved through the last three years under the shadow of COVID-19, I am personally pleased with what we accomplished. The staff did an amazing job. We are especially thankful for the continued support and commitment of our members and Board of Directors.

Some of our 2022 highlights include:

We remained open 24/7/365 with no interruptions in service to support our members and stakeholders with custom reports and statistics—providing historical data and tracking current trends in both vessel traffic and cargo.

We implemented MARVIN (Marine Activity Reporting & Vessel Information Network) in June 2022 – part of a significant proprietary database next generation project to achieve a secure, sustainable, and member responsive platform for data collection, storage, and statistical growth.

We made considerable progress on our 2020-2024 Strategic Plan, including hosting a Mid-Year Cycle Review Workshop—see our updates on page 8 for more details.

We continued to offer our Shipping Education Series on a virtual platform with enormous success and launched *Shipping 301 - The Columbia River: Our Marine Highway* in June 2022. We are honored to provide our community with opportunities to gain experience from industry experts, network with colleagues, and gain a deeper understanding of the nuances and roles of the shipping industry, vessel movements, and cargoes...all socially distanced!

We grew our member communications and outreach efforts, welcoming four new members, eight Friends of the Exchange, and the successful launch of an AIS Tutorial to enhance member experience with Exchange AIS, a benefit of membership.

As we close out this historic year, we want to say thank you to our members, our industry partners, and each person who makes up this maritime community.

On a personal note, on February 10, 2022, I announced to our Board and Membership that I will be retiring this year after 27 years, with a retirement date of July 31, 2023. I want to extend my profound thank you and appreciation to all our members and friends. It has been rewarding to work with each and every one of you as we came together to support and promote our maritime industry.

The Merchants Exchange is proud to have served you for the last 144 years and we look forward to the next 144!

Happy New Year from all of us!



Liz Wainwright
Executive Director

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History of Service



In 1879, Boss Shenck's Saloon on the Portland waterfront was an early gathering place for the maritime trade. News of ship arrivals was posted by patrons, and the establishment became the birthplace of the Merchants Exchange.

Since that time, the Merchants Exchange has grown and expanded in order to keep pace with the ever-changing maritime trade needs and advancing technology.

Operating 24 hours a day, seven days a week, the Merchants Exchange is an integral part of the maritime industry, providing the Lower Columbia and Willamette Rivers' maritime community with valuable information and services. As the leading provider of maritime vessel tracking and intelligence, cargo and vessel statistics, and communication and answering services, we ensure our members stay in the know.

Today, members of the Merchants Exchange include, but are not limited to: vessel agents and operators; admiralty attorneys; customs brokers; tug and barge companies; grain export facilities, freight forwarders; stevedores; ship repair services, and port authorities.

Additionally, Merchants Exchange provides extensive association management services.

Through our association management, we have brought together a diverse group of organizations, and has promoted and enhanced the common business interest of the maritime community. The Merchants Exchange continues to seek opportunities to serve its members and the maritime community as needs and government regulations change.

Staff Contacts

STAFF NAME	PHONE	E-MAIL
Anthony O'Reilly	(503) 220-2088	oreilly@pdxmex.com
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Liz Wainwright	(503) 220-2091	wainwright@pdxmex.com
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Shawn Kubitza	(503) 228-4361	kubitza@pdxmex.com
Thomas Semrau	(503) 220-4361	semrau@pdxmex.com

Exchange Organization

EXECUTIVE DIRECTOR

Liz Wainwright

ADMINISTRATIVE SERVICES

Executive Administrator: Bekah Brinkmeier
Administrative & Grant Specialist: Anthony O'Reilly

ACCOUNTING DEPARTMENT

Controller: Chann Noun
Accounting Specialist: Lisa Pomasl

MARINE OPERATIONS SERVICES

Marine Operations Manager: Carl Bertapelle
Marine Operations Lead: Thomas Semrau
Marine Operations Specialists:
John Cordasco, Jonathan JT Tuom,
Shawn Kubitz, Kara Estabrook

MARKETING AND MEMBERSHIP SERVICES

Marketing & Membership Manager: Mary Wiley

DATA & INFORMATION SERVICES

Comm. & Computer Systems Manager: Jonathan Nichol

ASSOCIATION MANAGEMENT

CLEAN RIVERS COOPERATIVE

General Manager: Curtis Cannizzaro
Operations Manager: Carl Boelter
Maintenance Mechanic - Marine: Ben Robinson
Administrative Coordinator: Mason Sullivan

COLUMBIA RIVER CUSTOM BROKERS & FORWARDERS ASSOCIATION

Association Administrator: Margerie Vis

COLUMBIA RIVER SHIPPERS ASSOCIATION

Independent Administrator: Liz Wainwright

COLUMBIA RIVER STEAMSHIP OPERATORS ASSOCIATION

Association Accounting Administrator: Chann Noun

LOWER COLUMBIA REGION HARBOR SAFETY COMMITTEE

Association Administrator: Bekah Brinkmeier
Association Administrator: Ashley Ros

MARITIME COMMERCE CLUB. COLUMBIA RIVER

Association Director: Margerie Vis
Association Administrator: Ashley Ros

MERCHANTS EXCHANGE SCHOLARSHIP FUND

Association Director: Margerie Vis
Association Administrator: Ashley Ros

MARITIME FIRE & SAFETY ASSOCIATION

Executive Director: Liz Wainwright
General Manager: Holly Robinson
Administrative Coordinator: Mason Sullivan

WORKING WATERFRONT COALITION

Executive Director: Ellen Wax

ROLE OF THE BOARD



The principal role of a Board member is stewardship. The directors of the Merchants Exchange are ultimately responsible for the management of the affairs of the Merchants Exchange. This requires active participation. The Board must ensure that the organization is operated for a not-for-profit purpose; it may not be operated for private benefit. Proper stewardship requires that the organization’s assets be held “in trust” to be applied to its mission.

One of the most important functions of the Board of Directors is keeping the resources and efforts focused on the mission. This requires the Board to have an adequate understanding of Merchants Exchange programs, staff and resources available to achieve the organization’s goals. As a starting point, every Board member should be familiar with the organization’s Articles of Incorporation, Bylaws, Role of the Board Policy, and Administrative Authority of the Executive Director.

The Board fulfills its role of stewardship through Board of Director meetings and participation in Board Committees. Committees include:

- CUSTOMS OF THE PORT
- EXECUTIVE & MANAGEMENT
- FINANCE & BUDGET
- GRAIN
- NOMINATING
- TECHNICAL & BUSINESS DEVELOPMENT

The Board is not expected to manage the day-to-day activities of the Merchants Exchange - that is the responsibility of the Executive Director. It is the Board’s responsibility to hire the Executive Director and to oversee that person’s work to see that the organization is fulfilling its mission. The Board annually reviews and assesses the Executive Director’s performance.

A related function of the Board is to set the compensation of the Executive Director. The compensation should be reasonable for the services rendered and compare favorably to similarly situated executives.

The Board oversees the effective use of the resources of the organization. Policies should be adopted and large transactions approved to ensure that the organization’s assets are not misapplied or wasted. The Board should ensure that the assets are invested prudently, avoiding high risk investments and employing some diversification of investments.

The Merchants Exchange engages in a five-year strategic planning process to guide the board of directors and staff as they continue to improve processes and member services.

2022 Board of Directors

PRESIDENT

Todd Krout (23)
Port of Vancouver USA

Adrian Burkard (25)
Jones Stevedoring, Co.

Earl Dixon (24)
United Grain Corporation

VICE PRESIDENT

Chris Cummins (24)
General Steamship Corporation

Geoff Doerfler (24)
Tidewater Transportation & Terminals

TREASURER

Roger Hsieh (24)
BNSF Railway Company

Gary Hodson (23)
ACGI Shipping

SECRETARY

Alex Scott (23)
Anchorage Launch Services Co.

Eric Kastner (25)
Cascade Marine Agencies Ltd.

Ryan Statz (25)
Columbia Grain Inc.

LEGAL COUNSEL

Tyson Calvert
Lindsay Hart LLP

Jim Cockrell (22) *(ex officio)*
President, Clean Rivers Cooperative
Owens Corning

Mat Cusma (22) *(ex officio)*
President, Maritime Fire & Safety Association
Schnitzer Steel

Capt. Jeremy Nielsen *(ex officio)*
Columbia River Pilots

Progress Report

2022 Year-End Highlights and 2023 Goals

MEMBER NEEDS

Team Leaders: Holly Robinson & Carl Bertapelle

- Activated BCDRP for Public Health Scenario during the COVID-19 Response (2020)
- Reformatted BCDRP document for user efficiency (2021/2022)
- Completed Virtual Event Platform Equipment Purchases and Office Meeting Room Upgrades (2021)
- Held MarOps relocation exercise (2022)
- Launched MARVIN database upgrade (2022)
- Hosted mandatory agent training for MARVIN platform (2022)

The Member Needs team's biggest highlight from this last year was the successful launch of **Marine Activity Reporting & Vessel Information Network (MARVIN)** and billing system on June 28th 2022. MARVIN is the upgrade to VITALS, the Merchants Exchange vessel information and tracking system. The new platform is stable and represents a 100% improvement over VITALS. Mandatory Agent Training was held to acclimate agents to the new platform, with 100% compliance for member agents.

Member Needs also addressed the recent changes to the Business Continuity Disaster Recovery Plan (BCDRP). Substantial staff time has been spent making the document more user friendly and editing for flow. The BCDRP Public Health Scenario was activated in 2020 as a response to the COVID-19 pandemic. Lessons learned from the last two years are being incorporated into the BCDRP Plan.

Upcoming items for Member Needs include: another MarOps relocation drill now that MARVIN is live, continued research into custom reporting/mobile apps, and additional AIS mobile viewing capability.

A workgroup will be offered during the research process to allow for member input as we investigate more custom reporting options. Members interested in participating in the Custom Reporting Development Workshop in April 2023 can get more information at our website:

www.pdxmex.com/marvin-2023/

MARITIME EDUCATION

Team Leader: Mary Wiley

- Held 4 sessions of "Maritime Virtual Roundtable" (2020)
- Launched ICS Lite (2020)
- Transitioned Shipping Education Series to be fully online and recorded (2021)
- Launched Shipping 301 (2022)

Maritime Education highlighted the launch of the Shipping Education Series from an in-person, one-day seminar to a four-part, online webinar. This shift was in direct response to the COVID-19 pandemic and has resulted in increased attendance and great success for the program. The program has also grown with the most recent segment introduced in 2022: Shipping 301: The Maritime Highway.

Additionally, the ICS Lite program was launched to provide an awareness level instruction on the Incident Command System and how it relates to maritime related incidents that might impact adjacent personnel along the River. This course is taught by Holly Robinson and is offered once per year.

In 2023, Maritime Education is looking for ways to celebrate the accomplishments of those that have completed the entire series through a special certificate or graduation program. Additionally, 2023 will be spent looking at options for continuing education units (CEUs) for those that attend the course.

SUCCESSION PLANNING AND CAREER DEVELOPMENT

Team Leader: Bekah Brinkmeier

- Completed Job Description Analysis (2021)
- Created comprehensive Onboarding Manual (2022)
- Documented internal transition processes (ongoing)
- Completed Association-specific Appendices for 96-Hour Executive Exit Plan (2022)

Succession Planning and Career Development highlighted the completion of the job description analysis and the creation of the Onboarding Manual. Much work has been completed in the realm of Onboarding at the Merchants Exchange. A positive Onboarding experience is directly linked to employee retention. Previously, a Skills Gap Analysis was planned for the staff to analyze training gaps, however it turned out to be cost-prohibitive and too difficult to adjust for the size of our staff. The Action Initiative has shifted to focusing on employee retention through additional work on the Onboarding Program.

Additional documentation has been completed noting the internal transition processes due to staff turnover that have been noted as well as the completion of the Association-specific Appendices for the 96 Hour Executive Exit Plan. The 96 Hour Plan came out of the previous Strategic Planning Cycle.

In 2023, Succession Planning and Career Development is looking to invest in an HR-specific onboarding software that is designed for small businesses. Ideally, this software solution will aid in document compliance, as well as streamline information and training, and assist in making sure all staff members who are brought into the Merchants Exchange have access to the same information. We are looking at several options that are not limited by number of seats and show promise as a resource library for existing staff as well as a way to monitor annual refresher training.

FINANCE

Team Leader: Lisa Pomasl

- Developed a Strategy Planning Tool for budgeting process (2020)
- AIS Site Visit to Alaska (2021)
- Merchants Exchange AIS Expansion into Coos Bay & Brookings (2022)
- MISNA Services Audit (annually)

Merchants Exchange set up antennas in Coos Bay and Brookings during 2022. This expansion is a result of a partnership with the Southwest Oregon Community College. We now offer complete Oregon coast coverage

extending into Southern Washington and down into Northern California. Merchants Exchange AIS has been a priority for the Finance team, in support of the Member Needs team. This included a site visit that was conducted by staff at the Marine Exchange of Alaska to learn about ways to expand usage of the data and software.

The MISNA Services Audit is another project that is managed by the Finance team. This Audit comes out of the previous Strategic Plan and is an annually updated document of all the Marine Exchanges that shows data such as popular reports, member numbers, and upcoming outreach activities. This document is updated in 3Q of every year.

In 2023, Finance will continue to serve in a support role for the Member Needs team as they work towards developing enhanced notifications and custom reporting and in a support role for Marketing as work continues on the Association Management Business Development Plan.

MARKETING

Team Leader: Mary Wiley

- Created a 90-min tutorial of the Merchants Exchange AIS for members; incorporated into SES 301 (2022)
- Implemented “Ship Traffic Report” distributed every Friday in email and social media. (2022)

Marketing strategies implemented to increase awareness of our services included the development of a 90-min AIS tutorial in conjunction with Marine Operations to enhance the usage of our AIS system. This tutorial has been incorporated into the Shipping Education Series 301 offered in June.

In 2022, the “Ship Traffic Report” was developed and distributed via email and social media every Friday. This report is very popular on social media and Merchants Exchange has seen increased engagement via likes, shares, clicks and website visits.

In 2023, Marketing will focus on an awareness campaign for MARVIN and AIS services as well as reviewing the branding standards for existing reports and externally distributed documents.

2022 Membership

ACGI Shipping Inc
Alexander Gow, Inc
Anchorage Launch Service Co
Blue Water Shipping, Inc
B.R. Anderson & Co
Cascade Marine Agencies Ltd
Centerline Logistics / Olympic Tug & Barge
Columbia Export Terminal
Columbia Grain International
Columbia River Bar Pilots
Columbia River Launch Service
Columbia River Steamship Operators' Association
Columbia River Pilots
Crowley Maritime Corporation
Degesch America, Inc
Duncan Shoemaker & Associates LLC
Durham & Bates Insurance
EGT, LLC
Executive Security Service, Inc
Foss Maritime Company
Fujitrans USA, Inc
General Steamship Corp Ltd
Geo. S. Bush & Company, Inc
Great Western Malting
Haglund, Kelley LLP
Inchcape Shipping Services
International Registries, Inc
International Transport Workers Federation
Interport PNW LLC
Jacob Engineering Group
John R Durdrey LLC
Jones Stevedoring Company
Kalama Export Company
Kinder Morgan Bulk Terminals
Kinder Morgan Energy
K-Line America, Inc
Lindsay Hart LLP
McCall Companies
McDonald - Pelz Commodities
Mid Columbia Producers, Inc
Monarch Inspection Services
National Cargo Bureau
North American Shipping Agencies
Norton Lilly International
Oregon Dept. of Environmental Quality
Overseas Merchandising, Corp (OMIC)
Pacific International Maritime Medical Services / SphereMD
Pacific Maritime Association
Port of Astoria
Port of Columbia County
Port of Kalama
Port of Longview
Port of Portland
Port of Vancouver USA
Portland Lines Bureau, Inc
San Pedro Harbor Ship Supply
Sause Bros.
Schwabe, Williamson & Wyatt PC
Seaport Marine Surveys, Inc
Shaver Transportation Company
Ship to Shore Water Taxi
Southport Agencies, Inc
T. Parker Host, Inc
Talon Marine Services
Temco LLC
Terra Hydr, Inc
Tesoro Maritime Company
Tidal Transport & Trading, Inc
Tidewater Transportation and Terminals
Tidewater Environmental Services
Toyota Tsusho America, Inc
TradeWest Brokerage Company
Transmarine Navigation, Corp
Transversal International, Corp
United States Customs & Border Protection
United Grain Corporation
Vanport Marine
Vigor Industrial LLC
Volunteer Ship Ministry
Washington Department of Ecology
Wilhelmsen Ship Service

Marine Operations Services

Our Marine Operations Services Department is staffed at all times with fully-trained and knowledgeable personnel. We are available 24 hours a day, 365 days a year to answer questions, provide updates, arrange for services, assist our members with their jobs, and help visiting vessels have a trouble-free arrival and stay in port.

Our staff is there for you . . . all day, every day.

VESSEL TRACKING

- 24/7 ship movement information
- Real Time tracking of commercial vessel movement between Astoria, and Portland/Vancouver USA and along the entire Oregon coastline
- Receive 96-hour advance notification of ship arrival for MFSA Vessel Response Plan

VESSEL REPORTING

- Data capture and access to information
- Database maintenance and archiving
- Manage call jobs
- Notification of vessel movements



REGULATORY COMPLIANCE

- Interact with government agencies to implement efficient procedures and processes
- Monitor government regulations and initiatives from an operational perspective

COMMUNICATIONS

- Act as liaison, information hub
- Answer vessel related questions from vendors, suppliers, crew etc.
- Relay information to/from vessel
- Maintain VHF radio coverage for Lower Columbia River
- Potential problem notification

REAL-TIME REPORTS

- Vessel Activity Report
- Ships by Location
- 4-Day Lightship Report

ANSWERING SERVICE

- Local to worldwide connectivity
- Maintain weekend duty lists for members



Member Services

The Exchange tracks, records and reports on commercial vessels that enter the Lower Columbia River Marine Transportation System. As the leading provider of information related to the intermodal transportation system, we maintain over 100 years of data from which we can develop real-time and historical custom reports.

Over 100 years of service & historical data

REPORTS

Monthly vessel and cargo statistics

- Cargo and Vessel Summary Report
- Columbia River Cargo Statistics Report
- Columbia River Grain Statistics Report
- Custom Report available upon request



DAILY NEWS BULLETIN

The Daily News Bulletin is a convenient daily round-up of news relevant to the Columbia and Willamette River Shipping Industry. The Daily is distributed via e-mail each weekday morning. This service is free for our members and our friends!

THE EXCHANGE

The Exchange is a bi-monthly newsletter featuring Pacific Northwest maritime industry relevant articles and reviews from regional associations and Columbia River Port Authorities. The Exchange is a magazine styled newsletter distributed electronically and free to our members and friends.



OTHER PUBLICATIONS

- Daily Grain Bulletin
- Merchants Exchange Grain Trading Rules
- Customs of the Port

GRANT MANAGEMENT SERVICES

The Merchants Exchange offers Grant Management services to its industry members to help reduce administrative responsibilities related to handling federal funds. The company has direct experience managing Port Security Grant Program (PSGP) grants from FEMA and the Department of Transportation. Its expertise in these grants can be applied to other federal and state funding opportunities such as Assistance to Firefighter Grants (AFG), Staffing for Adequate Fire and Emergency Response Grants (SAFER), and Fire Prevention and Safety Grants (FP&S) programs.



GRANT ADMINISTRATION SERVICES:

Staff has taken experience and training from administering the PSGP grants and offered services to our members to support their grant application and award administration needs. PSGP funds focus on supporting increased port-wide maritime security risk management; enhancing maritime domain awareness; supporting maritime security training and exercises; and maintaining or reestablishing maritime security mitigation protocols that support port recovery and resiliency capabilities while addressing the security needs of the port area.



Sign Up! &

Stay Informed



The Daily News Bulletin & The Exchange Newsletter are FREE to the maritime community

Go to our website to learn more:
www.pdxmex.com/services/reports

Member Services

The education program was created in 2015 with the aim of improving understanding of the Columbia River Marine Transportation System. It aims to educate the maritime community through quality informational content and raise awareness of the resources available in the maritime and transportation industry.

Shared knowledge and education strengthen our industry

SHIPPING EDUCATION SERIES

The shipping education program continues to prioritize industry education and has moved online to offer more flexibility and reach a broader audience. The program includes four weekly classes, each lasting two hours, providing a total of eight hours of instruction from industry experts. The classes are designed to provide in-depth professional development opportunities.

Shipping 101: The Business of Shipping

The seminar examines offers an overview of the business of shipping on the Columbia River. The classes cover the history of the River, infrastructure, ports and terminals, and the economic impact of imports and exports in the region. Participants will also learn about the various types of vessels that travel the River, as well as the roles of the key players in the maritime industry.

Shipping 201: The Movement of a Ship

The seminar examines provides a comprehensive look at the business of shipping from the perspective of a ship. It covers the requirements and regulations for a ship, as well as the crucial roles of agents, pilots, regulatory agencies, insurance, and laws in allowing a ship to move from port to port.

Shipping 202: The Movement of Cargo

The seminar examines the business of shipping from the perspective of cargo. It covers the types of cargo, labor demands, and different modes of transportation, including rail, barge, and pipeline. The program also discusses the requirements of the supply chain, logistics, and regulatory compliance and their impact on the economy of the Columbia River.

Shipping 301: The Marine Highway

The seminar focuses on the operations and navigation of the Columbia River as a navigable waterway and its position as an American Marine Highway. It covers topics such as the operations and maintenance of locks, dams, dredging, and buoys, river forecasting, navigation, charts and surveying, and the impacts on the Columbia River transportation system.

MARK YOUR CALENDARS:

Shipping 101: The Business of Shipping
October 2023

Shipping 201: The Movement of a Ship
February 2023

Shipping 202: The Movement of Cargo
April 2023

Shipping 301: The Marine Highway
June 2023

ICS Lite: Introduction
March 2023

ICS LITE

We focus on the basic components of the Incident Command System (ICS) and its uses in the maritime industry. Our discussion will help you understand the history and basic components of ICS and we will present examples and scenarios for prompting use of the system. Finally, we will provide you with resources and information on ICS courses and certifications.

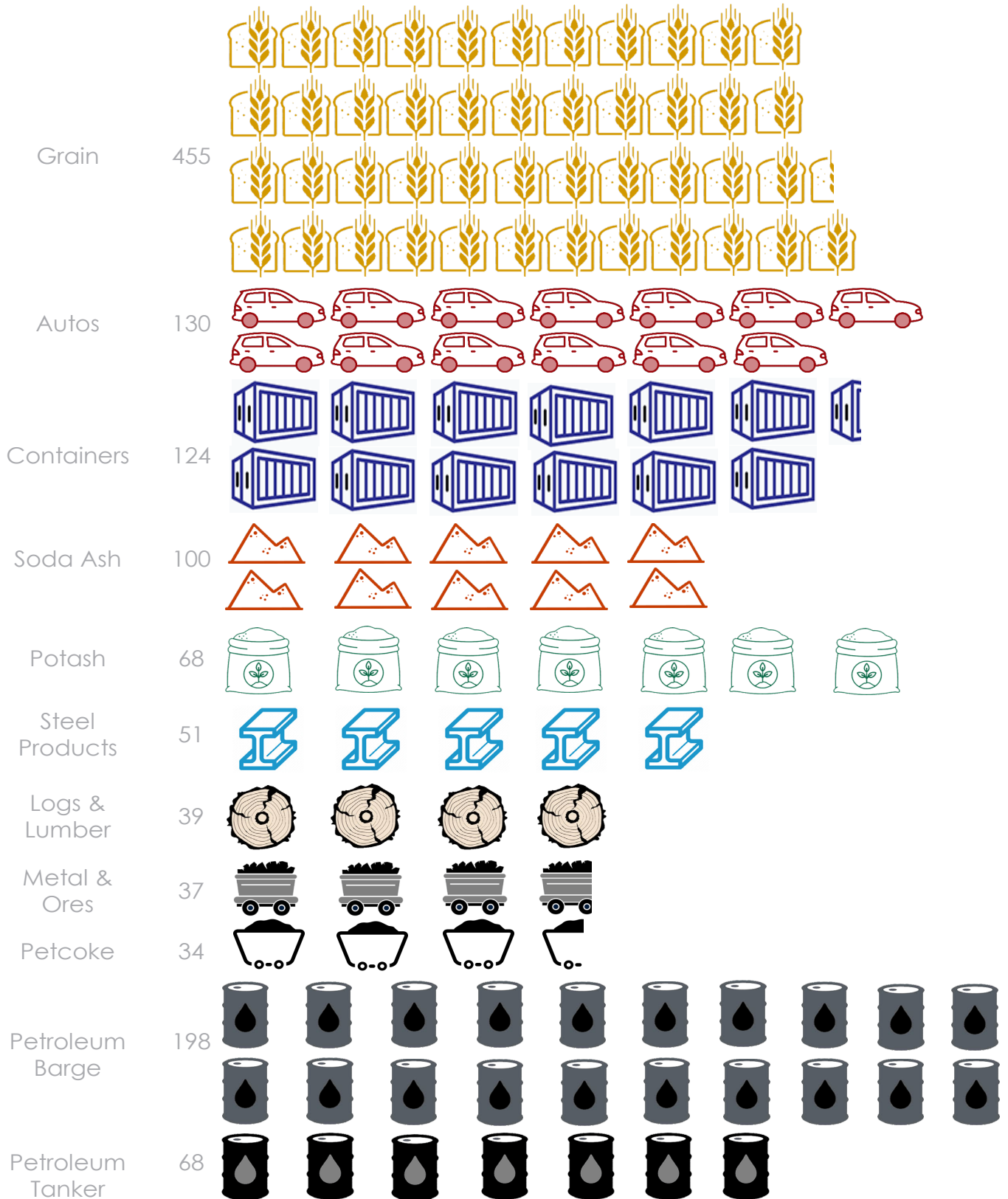


*Join us
online!*

Year-End Statistics

2022 Vessel Calls by Cargo

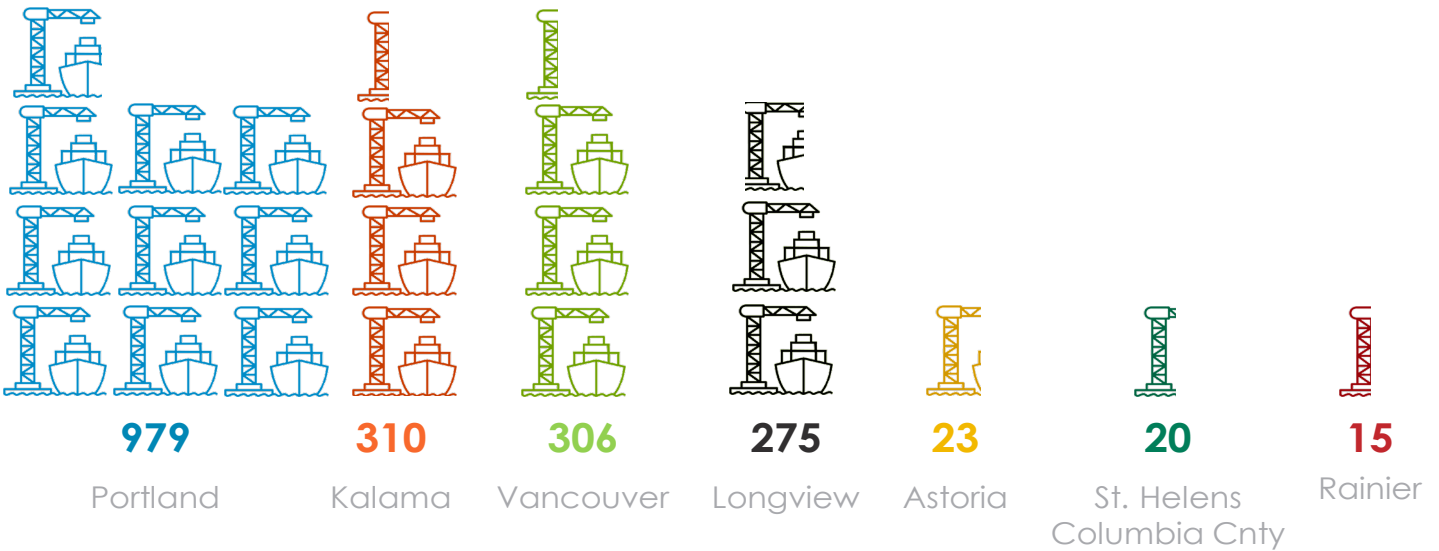
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Year-End Statistics

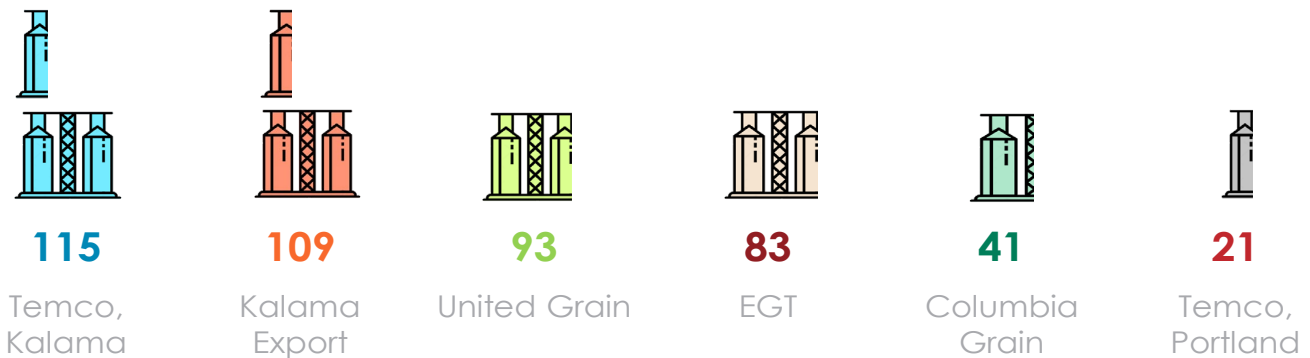
2022 Total Vessel Calls by Port Area

icon represents 100+/- calls



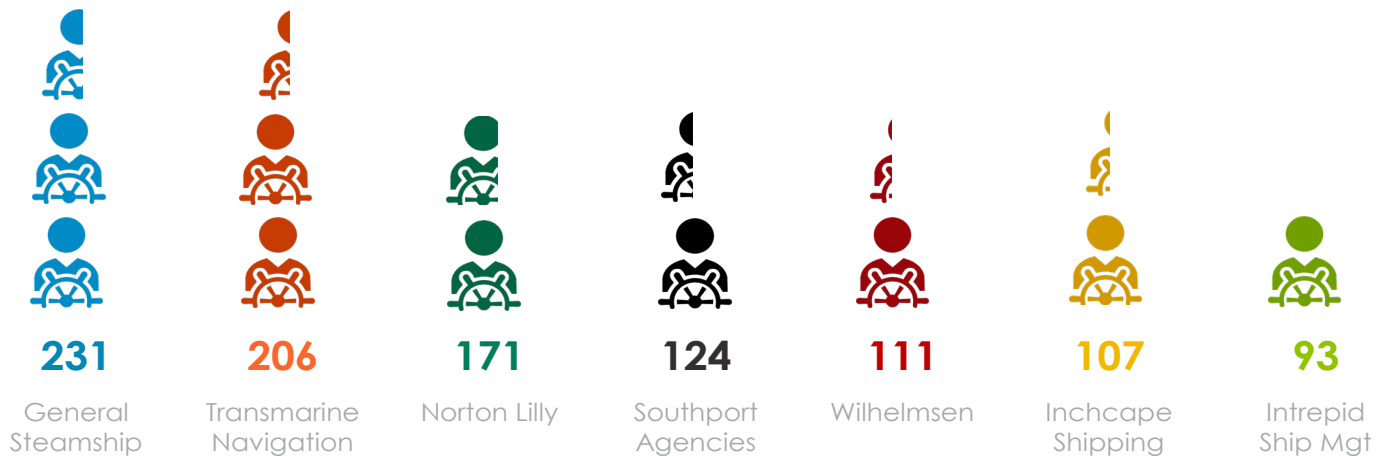
2022 Vessel Calls by Grain Terminal

not showing all terminals, icon represents 100+/- calls

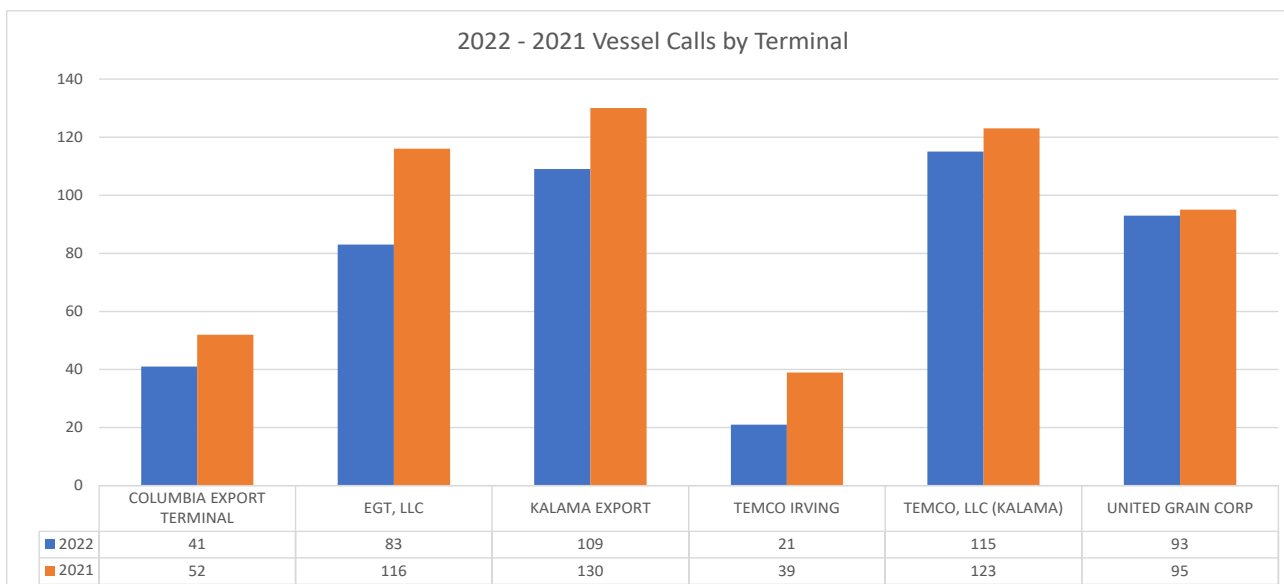
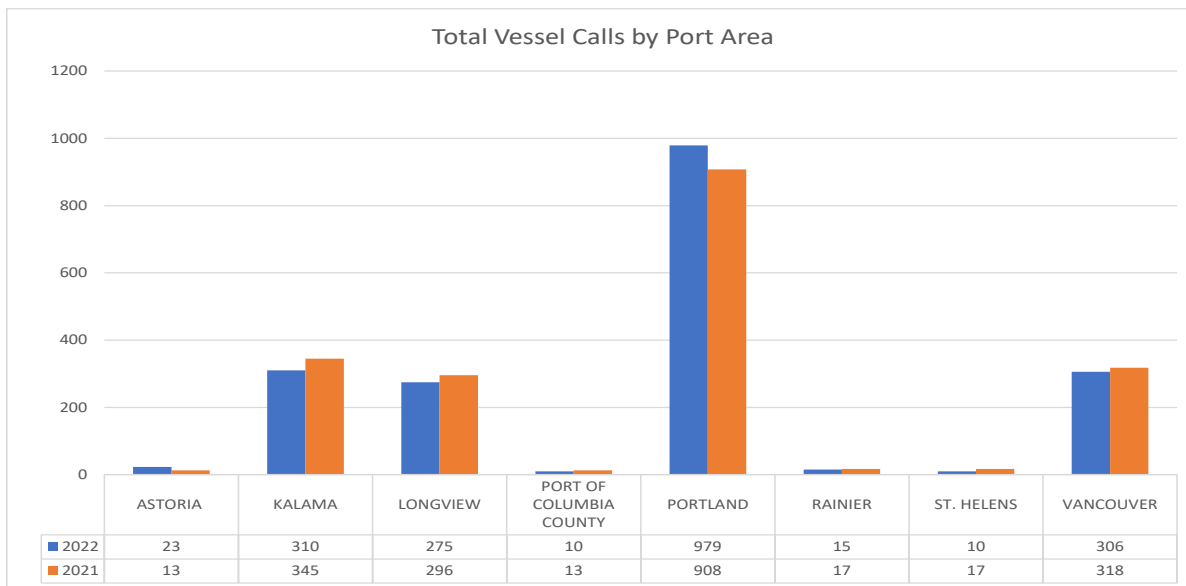


2022 Vessel Calls by Agent

not showing all agents, icon represents 100+/- calls

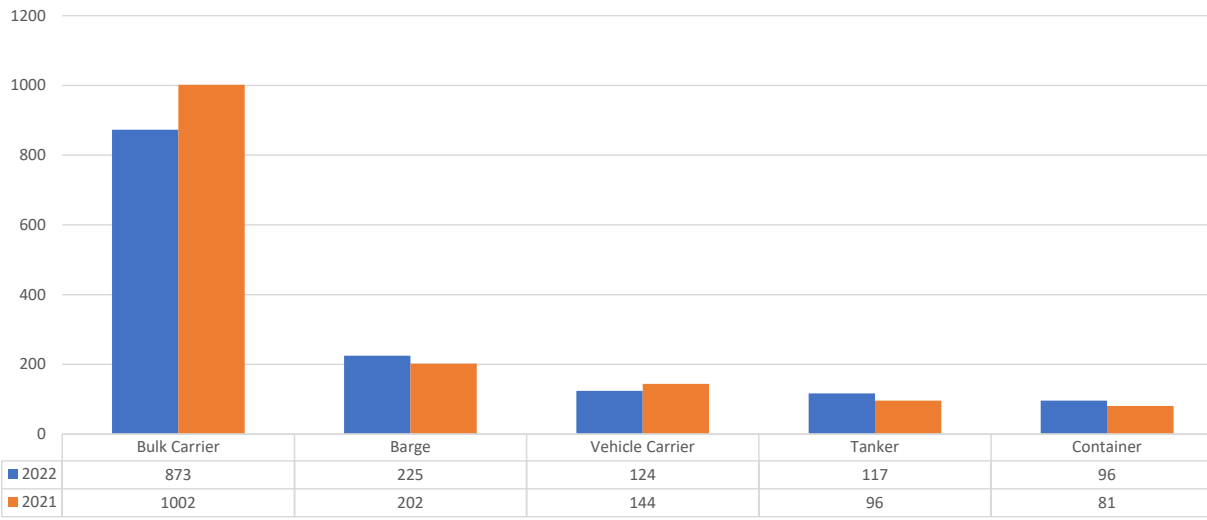


Year-End Statistics

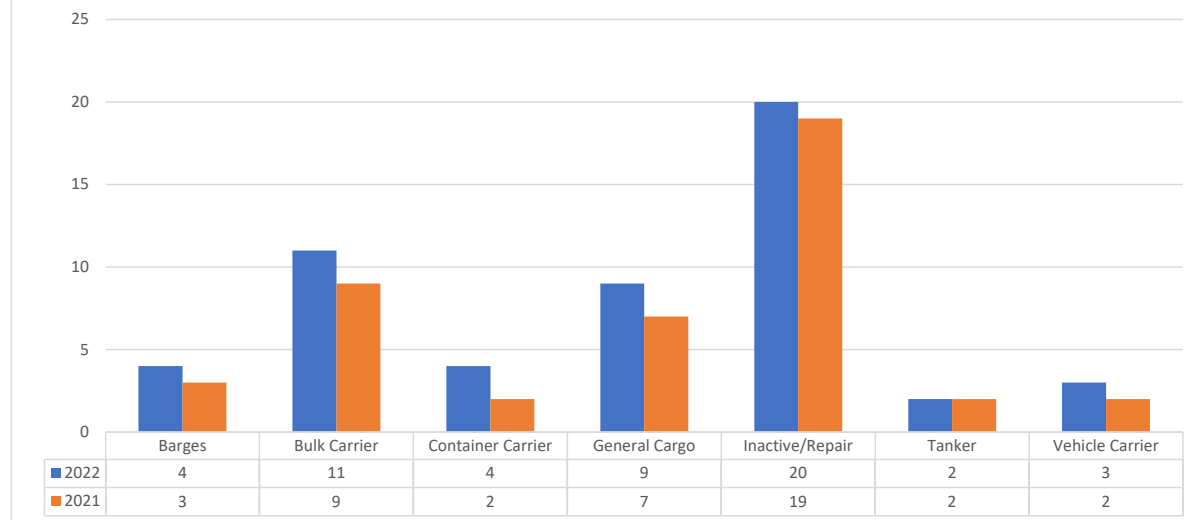


Year-End Statistics

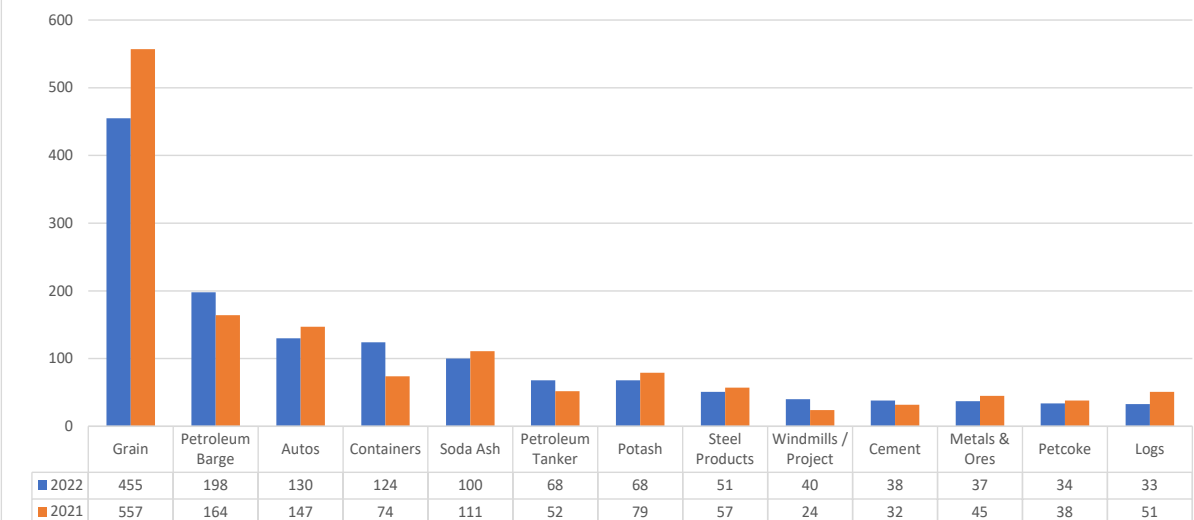
2022 - 2021 Vessel Calls by Ship Type



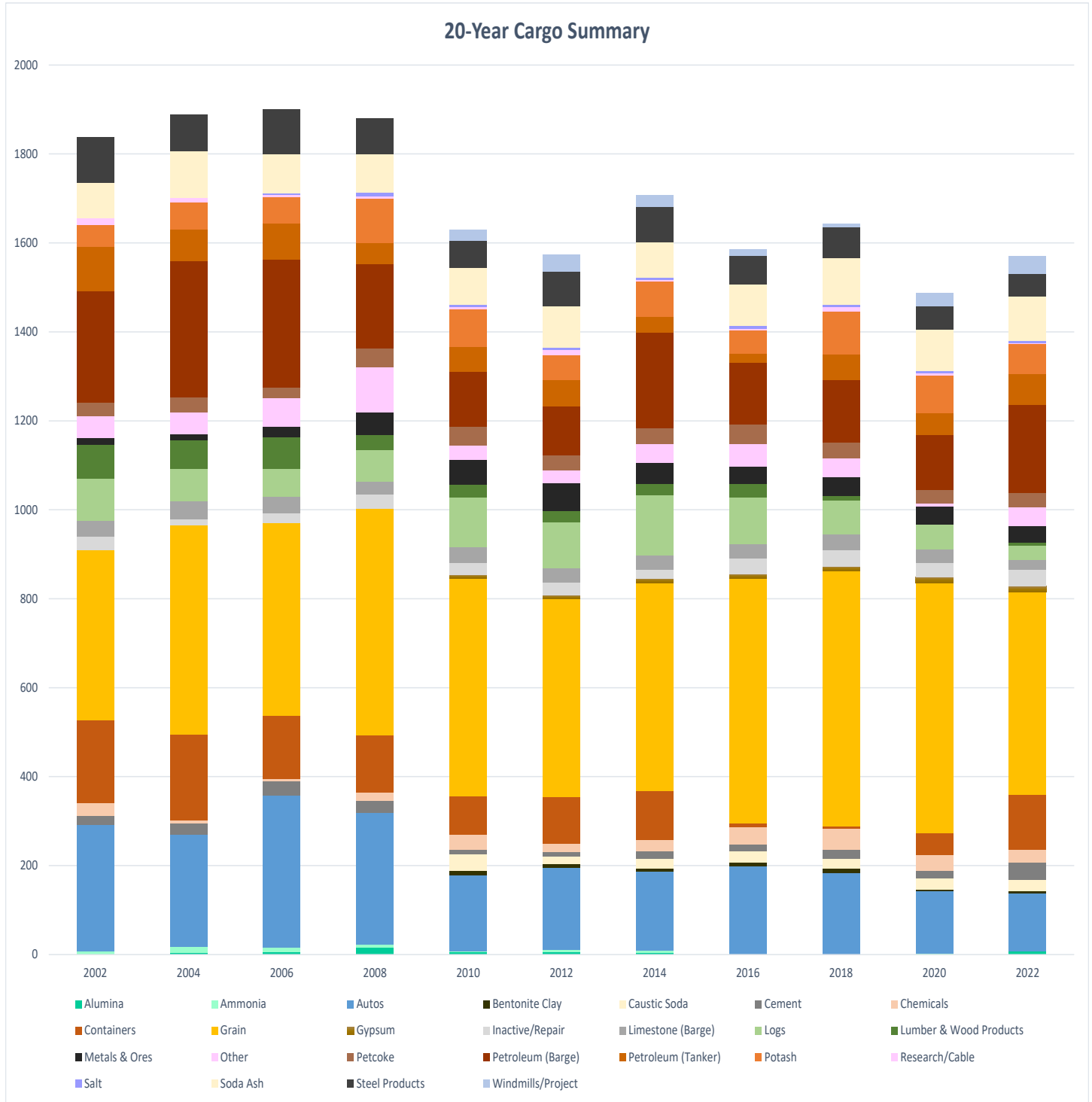
2022 - 2021 Average Stay in Port (days)



2022 - 2021 Vessel Calls by Cargo Type



Year-End Statistics



*Get your
Customized Reports*



We share reports with relevant data to our members. We collect over 100 data points on commercial vessels on our waterways. Please contact us to learn more about our custom reports! Learn more at: www.pdxmex.com/services/reports

Association Management Services

ASSOCIATION MANAGEMENT SERVICES

The Merchants Exchange has an established history of collaborative, innovative approaches to association management. For over 100 years, we have been trusted to provide association management services to other not-for-profit organizations starting with the Portland Grain Exchange in 1915. We pride ourselves on providing exceptional, cost-effective, professional services for maritime and international trade-related associations.

We understand non-profits, because we are a non-profit.

BOARD, MEMBERSHIP, AND GOVERNANCE SUPPORT

- Coordinate board and committee meetings/events
- Coordinate distribution of meeting materials
- Member relationship management to track member activities and engagements
- Develop membership engagement strategies to increase participation and improved retention
- Support and promote revenue strategies, member dues, fund-raising, and sponsorships

ACCOUNTING SERVICES

- Manage accounts payable and receivable
- Produce profit and loss statement and budget reports
- Invoice and billing
- Audits and compliance coordination

ADMINISTRATIVE SERVICES

- Our office is your office; streamline operations
- Office space, meeting rooms, audio/visual capabilities
- Call answering, customer services and postal services
- Track, record, report & maintain historical documents
- Develop and implement reporting procedures
- Research and analyze system to improve operations

MARKETING & COMMUNICATIONS

- Website maintenance
- Public relations and social media coordination
- Brand management and promotional items
- Email communication management
- Creative design and content development services
- Brochures & flyers, annual / monthly reports & newsletters
- Industry printed and online directories

EVENT PLANNING

- Event logistics services
- Accommodations and sourcing
- Vendor negotiations and budgeting
- Billing and cost reporting
- On-site coordination
- Event communications and marketing
- Registration, event information and attendee packages
- Trade show and exhibitor services
- On-site and virtual event technology support
- Training and educational events
- Conferences and seminars

Client Associations

ASSOCIATION MANAGEMENT SERVICES

Our management services are completely customized and vary from basic administrative to turnkey operational services. We can facilitate everything from small informal meetings in the Portland/Vancouver area to large national conferences held in the Pacific Northwest region. We offer a unique range of services, from a la carte to comprehensive administrative and program management services.

Clean Rivers Cooperative
Columbia River Customs Brokers & Forwarders Association
Columbia River Shippers Association
Columbia River Steamship Operators' Association
Lower Columbia Region Harbor Safety Committee
Maritime Commerce Club, Columbia River
Maritime Fire & Safety Association
Merchants Exchange Scholarship Fund
Working Waterfront Coalition

Associations

Clean Rivers Cooperative, Inc.

www.cleanriverscooperative.com

Association Board President:

Jim Cockrell, Owens Corning (22)

General Manager: Curtis Cannizzaro

Operations Manager: Carl Boelter

Equipment Maintenance Supervisor: Vacant

Maintenance Mechanic - Marine: Ben Robinson

Administrative Coordinator: Mason Sullivan



Clean Rivers Cooperative is an oil spill removal organization comprised of 21 member companies with facilities located along the Columbia and Willamette Rivers (located in both Oregon and Washington). Clean Rivers provides spill response equipment and services for its members and their facility response plans. It is also the primary Spill Response Contractor to the Maritime Fire & Safety Association Vessel Response Plan for vessels transiting the Columbia and Willamette Rivers.

Columbia River Customs Brokers & Forwarders Association, Inc. (CRCBFA)

www.crcbfa.org

Association Board President:

Tina Lyons, Double River Forwarding, LLC

Association Administrator: Margerie Vis



This association was organized in 1977 to further the business and interests of the customs brokers and freight forwarders within our area. This association is very active in providing its membership with classes, seminars on procedural updates, speeches and forums on the current demands of the shipping community. Additionally, the association maintains a forum for open dialog with various governmental agencies and for solving local problems at a local level. CRCBFA currently has 22 full members (voting members that are employed in the business), 15 associate members (non-voting members that are involved in businesses relating to the brokerage business), and five individual members.

Columbia River Shippers Association (CRSA)

www.crsa-oregon.tripod.com

Association Board President:

Corby Braunger, Richardson Sports

Independent Administrator: Liz Wainwright

The CRSA was established in 1988. Its mission, through the combined commercial strength and influence of its members, is to maintain and improve steamship service to Portland and to ensure stable shipping rates for importing containerized cargo into the region. Services specific to this association include: negotiation of annual service contracts with three steamship lines, new shipping rates negotiated and contracts amended throughout the year, and members receive individual weekly tracking reports on all booked shipments and Member assistance with steamship line service issues.



**COLUMBIA RIVER
SHIPPERS
ASSOCIATION**



Columbia River Steamship Operators' Association, Inc. (CRSOA)

www.crsoa.net

Board Chair:

Rob Rich, Shaver Transportation

Executive Director: Kate Mickelson

Director of Member Services: Tereza Edwards

Accounting Administrator: Chann Noun, Merchants Exchange

The Columbia River Steamship Operators' Association, Inc. (CRSOA), established in 1922, as the Portland Steamship Operators' Association, includes members representing ship owners, operators, agents, launch services, towing, and bunkering, as well as facilities and ports along the Columbia, Willamette, and Snake River systems and Oregon coast. The CRSOA's mission is to facilitate trade, provide business leadership, exercise principles of environmental stewardship, serve as an industry focal point, and promote operating policies and practices that are safe, reliable, efficient, and cost-effective.



LOWER COLUMBIA REGION
HARBOR SAFETY COMMITTEE

Lower Columbia Region Harbor Safety Committee (LCRHSC)

www.lcrhsc.org

Association Board Chair:

Larry Landgraver, Port of Longview

Association Administrator: Bekah Brinkmeier

The Lower Columbia Region Harbor Safety Committee (LCRHSC) is an open forum comprised of public and private entities with vital interests in assuring safe navigation to protect people, the environment, and property on the waterways within the Lower Columbia Region. The Lower Columbia Region encompasses the Columbia River and its navigable tributaries from the seaward approaches to the Columbia River Bar to Bonneville Dam. The LCRHSC provides an inclusive, cooperative and equitable venue for addressing waterways issues to ensure the continuation and improvement of prudent management practices for our local waterways. Throughout the process, the LCRHSC strives to ensure reliable and efficient marine transportation.

Associations

Maritime Commerce Club, Columbia River

www.maritimecommerceclub.org

Association Board President:

Jim Matthews, Marsh USA, LLC

Association Director: Margerie Vis

Association Administrator: Ashley Ros



MARITIME COMMERCE CLUB

Columbia River

The Maritime Commerce Club, Columbia River (MCC) was created to further the interests of individuals and businesses involved in maritime trade along the Columbia and Willamette River Systems. The Club provides opportunities for social networking, keeps members informed of the events shaping the maritime industry, and participates in philanthropic endeavors that strengthen our community.

Created from the merger of the Portland Shipping Club and the Propeller Club, Port of the Columbia River, the Maritime Commerce Club brings together members possessing a wealth of industry knowledge and history with individuals who have the vision to keep the maritime industry moving into the future. The Club will continue to sponsor events that honor those who have been invaluable to the maritime community; bring awareness to issues shaping our industry; celebrate the impact our industry has had in developing our region; and give back to the community we live in.

Maritime Fire & Safety Association (MFSA)

www.mfsa.com

Association Board President:

Mat Cusma, Schnitzer Steel (22)

Executive Director: Liz Wainwright

General Manager: Holly Robinson

Administrative Coordinator: Mason Sullivan



Established in 1983 in the aftermath of the 1982 M/V Protector Alpha fire, the MFSA supports shipboard fire training and equipment for land-based firefighters from thirteen agencies in Oregon and Washington. In 1991, oil spill response and preparedness was added to the mission of MFSA. This association coordinates shipboard fire and spill response needs between two states, fourteen cities and seven port districts along 110 miles of shipping channels. The MFSA has become a national model; the Revised Mutual Aid Agreements, signed by all participating fire agencies, enable fire agencies to assist each other in the event of a shipboard fire on the lower Columbia and Willamette Rivers while the MFSA Vessel Response Plan provides oil spill contingency planning and response coverage to approximately 1600+/- ships and barges each year.



Merchants Exchange Scholarship Fund

www.pdxmex.com/scholarship

Association Board President:

Alex Scott, Anchorage Launch Services Co.

Association Director: Margerie Vis

Association Administrator: Ashley Ros

In December 2003, the Merchants Exchange established a new entity, the Merchants Exchange Scholarship Fund, which is the successor to the Women's Shipping Club Scholarship Fund, established in 1981. Their goals were to provide scholarships to individuals who had made a commitment to work in the marine transportation industry and international trade. We continue the work of this Fund. The Exchange scholarships are awarded to those who have demonstrated academic ability and personal qualities that will permit them to benefit from higher education. The scholarships are awarded to students seeking careers in Maritime Affairs and/or International Trade.



Working Waterfront Coalition (WWC)

www.workingwaterfrontportland.org

Association Board President:

Mallory Moran, The Greenbrier Companies / Gunderson Marine

Association Executive Director: Ellen Wax

Established in 2005, the Working Waterfront Coalition (WWC) is an organization of businesses concerned about the environmental health and economic vitality of the Portland Harbor. The WWC advocates for sound public policy that promotes environmental, social and economic sustainability. Portland's Harbor is a vital employment area; home to thousands of valuable high-wage, high-benefit jobs. The WWC, with its extensive knowledge of harbor industry needs, active industry participation and record of effective advocacy, is dedicated to working with its partners to ensure an appropriate balance between environmental concerns and the needs of river related employers. The Coalition's activities include:

- Advocating with local, state and federal officials and agencies on behalf of marine-dependent and river-related businesses.
- Working to broaden community understanding of: the importance of the Portland Harbor as one of the most impactful employment areas in the region, and the harbor industries' dependence on a limited land supply suitable for business needs.
- Providing up-to-date information and advice to coalition members regarding developments in the public policy and regulatory arena.



MERCHANTS EXCHANGE

MERCHANTS EXCHANGE

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Portland, Oregon 97201

24-Hour Marine Operations Service Dept
(503) 228-4361

