

Advancing Graphic Communications



**PRINTING
INDUSTRIES
OF AMERICA**

2015 ANNUAL REPORT

- ▶ CENTER FOR TECHNOLOGY AND RESEARCH
- ▶ ENVIRONMENTAL, HEALTH, AND SAFETY AFFAIRS
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2015

ANNUAL REPORT

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CHAIRMAN'S MESSAGE

Dear Stakeholders,

Every business, whether it is a commercial firm or a nonprofit association, must be established on a strong foundation to be able to build a successful future. After several years of transition and change, 2015 found Printing Industries of America standing firm on its solid foundation and developing ever more relevant and meaningful programs to serve its membership.

As immediate past Chairman of the Government Affairs and Labor Policy Committee, I have a special place in my heart for our political advocacy programs. I believe it is critical to raise the industry's political visibility on Capitol Hill, and Printing Industries of America does that through its many government affairs programs. In 2015, we hosted our annual legislative conference in Washington, D.C., **Print's Voice (fondly referred to as the "Fly-In")** in cooperation with NPES. After meeting his Member of Congress at the Fly-In, our new Government Affairs Chairman Doug Rawson hosted a visit with her at his facility!

The Government Affairs team also launched the **Consumers for Paper Options (CPO)** coalition in 2015 and supported the **#HowLifeUnfolds** campaign, promoting paper and paperboard products. I'm extremely proud of all of these advocacy efforts that help to maintain our visibility at our nation's capitol!

But of course, Government Affairs is only one of the many programs Printing Industries offers to assist members in running their businesses more effectively. Our HR team kept membership abreast of the ever-changing overtime exemption regulation story throughout the year along with webinars and seminars on timely new subjects like using social media and personal electronic devices at the office. The department's inexpensive service to review employee handbooks is a great value and useful as we begin to employ more "millennials" in our businesses.

The Center for Print Economics and Management spent the year hard at work developing a series of new tools to help members, including the reinvented **Dynamic Ratios** program and the **Financial Performance Assessment Program**. The team also formed a strategic partnership with the Department of Management at Middle Tennessee University to conduct research to develop new insights to effective strategy and operational management in the printing industry. Look for insightful reports to come out of that partnership in the near future!

In the realm of education, one of the biggest stories of 2015 was the decision, at the advice of the Board of Directors, to resurrect Printing Industries' keystone annual event for printing company leaders, the **President's Conference**, set to run in March 2016. The decision reflects a move away from hunkering down and surviving and toward growth, networking, and thriving!

Our online educational programming continued to expand as well, with more courses added to the already robust iLearning Center and the roll out of the unique sales coaching course "Power Selling Program."

Printing Industries of America continues to provide support to our members through the Technology and Research department. In 2015, the department conducted its first production inkjet press acceptance, demonstrating that the tried and true acceptance protocol can be as effectively used for inkjet as it can for offset presses. The department continues to provide wide-ranging consulting services, research studies, white papers, and an array of lab services performed at the brand new testing lab constructed at headquarters in Warrendale, PA.

As we move forward, I am confident that Printing Industries of America will continue to build upon the solid foundation of products and services developed for the benefit of our members and I'm pleased lead in this effort.



Bradley L. Thompson II

Chairman of the Board of Directors
Printing Industries of America





CEO'S MESSAGE

Henry Ford once said, “If everyone is moving forward together, then success takes care of itself.” 2015 stands out as the year that Printing Industries of America and its core team renewed its focus on moving forward by building compelling new programs and dedicating our efforts to significant growth for our members and the industry.

Moving into a new home can be inspirational, a kind of new creative canvas. This has been true of the PIA team, who emerged from the transition to our new headquarters building with some fantastic new programs and a renewed focus on our key initiatives.

Take for example our educational programs. Growing from a modest beginning with half a dozen courses, our online educational portal, the iLearning Center, grew its course offerings to nearly 40 in 2015. Springboarding off of the suite of sales-focused courses in the iLearning Center, the education team developed a new sales program with coach Leslie Groene, marrying the online courses with live training to build the new **Power Selling Program**. Several dozen sales representatives have taken advantage of this unique eight-week sales coaching program after its roll out in October 2015.

Another great example is the reinvention of the Ratios studies by the Center for Print Economics and Management. The new **Dynamic Ratios** features a shorter, easy-to-use survey form, new Kew Performance Metrics, and a new interactive Dashboard giving members on-line access. Together with the new **Financial Performance Assessment Program**, which provides members with an assessment of their financial performance, this promises to breathe new life into a core Printing Industries’ program.

In 2015, our Environmental Health and Safety team helped dozens of members facing inspections and citations, even flying in to visit member facilities with as little as one-day’s notice. Through the year, EHS staff actively engaged in opposing several very onerous regulations that the EPA has imposed including the new Waters of the United States rule, ozone standard, and greenhouse gas emission reductions from power plants. This team is dedicated to supporting our membership!

To bolster Printing Industries’ significant growth plan, and with the support of our Board of Directors, the organization hired a Vice

President of Business Development in 2015. This new business development initiative serves to establish and implement strategies to increase revenue through partnering, sponsorships, product development, and non-dues revenue. In its first months, the business development VP identified our significant organizational assets, helped develop and implement business development strategies and plans, and began building critical relationships with potential sponsors, partners, and customers.

Moving forward, the business development strategy is razor focused on driving revenue by executing an Action Plan that focuses on product and market development, market penetration, and accessing customers, partners, and sponsors through different channels and in new ways.

2015 saw the influx of a number of fresh new faces on the Printing Industries of America team at headquarters; a full third of the staff now fall into the “millennial” category. This energetic young team, together with our experienced senior staff, will indeed help build continued success for the organization as we move forward, together.

Michael F. Makin

President & CEO

Printing Industries of America





CENTER FOR TECHNOLOGY AND RESEARCH UPDATE

THE CENTER FOR TECHNOLOGY AND RESEARCH is a critical resource for printing companies that need help solving problems. Here's just one example from 2015. A print service provider struggled for months to successfully produce a job that required a special coating and found that the coating would not dry properly. After struggling to solve the issue for some time with no success, the company turned to Printing Industries of America for help. PIA's technical staff met with company representatives, performed tests on the printed pieces, and discovered that a fugitive chemical had been introduced in the preparation of the coating. Problem solved!

Printing Industries of America technical staff helped this company to solve a costly problem and as a result the company joined its local affiliate. This is just one story of how the Center's technical assistance can drive membership while helping printing companies' operations.

Members can connect to PIA for a wide range of cutting-edge technical information, testing, and, education, including free benefits such as:

Ask the Technical Experts—A monthly Q&A provided to affiliates that in turn gives their members valuable technical information.

Technical Hotline—Need to know the best ink for direct food contact? Have questions about HIPAA compliance? This invaluable member service is just a phone call away! Dillon Mooney and the rest of the technical staff are ready to help with all technical questions.



2015 MIS Survey—A directory of MIS software options, this comprehensive annual report provides information from vendors of management information systems (MIS), including accounting

issues, estimating, computer platforms, inventory controls and support, JDF functionality, and target applications. It is available to all members at www.printing.org/free.

2015 Mailing Software Survey—Also available online at www.printing.org/free, this comprehensive report gathers information on the functionality, software compatibility and usage, support and training, and purchase price of address verification, presort, and post-presort software. This is the most comprehensive resource available for those looking to compare mailing software.

Mailing Assistance—Members can connect with the Center for Technology and Research for mailing information and advice. Along with the Technology Hotline, members can find this information at www.printing.org/mailling. In 2015, Jim Workman, Vice President, Technology and Research, chaired the **Greater Pittsburgh Postal Customer Council**, allowing PIA to improve its relationship and access to USPS to seek answers to postal questions directly from the source!

Consulting—PIA assists member companies in all areas of consulting, including technical, strategic planning, business, and sales. PIA excels at connecting members with top industry consultants with the expertise and successful track records to provide solutions and correct deficiencies of all kinds.

Quality and Process Control Devices—Members have discounted access to 50 quality and process control devices that can be used to monitor print and imaging quality, diagnose problems, and check color vision and color viewing conditions. The majority are designed and manufactured by Printing Industries of America.

InterTech™ Technology Awards—This program awards industry suppliers for technological innovation and impact on the industry. Since the first award presentation in 1978, more than 300 technologies have been honored. Ten innovative technologies were recognized at the **2015 InterTech Technology Awards Gala**—many of which will certainly have a hand in shaping the future of the industry.

Laboratory Services—This invaluable member service is provided to those trying to resolve a technical conflict as well as to companies wishing to have ink routinely tested for quality control purposes. **The Paper and Ink Lab** is one of the few independent labs of this type in North American and is able to conduct more than 35 different tests



of paper, ink, and their interactions. The lab evaluated over 120 jobs in 2015 and serves as the sole facility for testing ink conformity to the ISO ink standard 2846. Member companies receive a significant discount on all lab services.

Press Simulation Software—The Center for Technology and Research sells and services simulation software that replicates operating sheetfed and heatset web offset printing presses. In 2015, the Center sold a dozen licenses, primarily to two- and four-year colleges and universities with graphic communications programs, allowing these institutions to add the virtual equivalent of a full-size press to their labs.



Technical Association of the Graphic Arts (TAGA)—Printing Industries of America manages TAGA, a global association for individuals researching, developing, and studying graphic arts technology. The **2015 TAGA Annual Technical Conference** in Albuquerque, NM, hosted 110 attendees, including professionals and students from seven universities. The conference provides a forum for the presentation of technical and scientific papers on research straight from the laboratory, studies from the pressroom, and software and engineering systems. TAGA also houses the largest collection of publicly available research papers on graphic arts subjects in the world, some of which date back to 1948.

Custom Training—Customized training programs are available for companies at a remote location or at their own facilities, allowing companies to help their employees learn new skills or gain training on new software or systems.

Looking Back and Moving Forward

In 2015, the Center for Technology and Research continued to build on successes from 2014, including a continued focus on providing information about production inkjet presses to members. A list of the devices available on the market is posted at www.printing.org/productioninkjet. Throughout the year, Center staff wrote and presented about the impact of inkjet and how to evaluate inkjet presses, helping members stay abreast of developments in production speed inkjet presses as this technology continues to complement and, in some cases, supplant offset and toner-based printing presses.

MEMBER SUCCESS STORY:

In 2015, the Center conducted its first press acceptance test for a member that was installing a production speed inkjet press, proving that PIA's press acceptance protocol can be effectively applied to inkjet as well as offset presses.

The Center published *Utilizing NFC in Graphic Communications*, a white paper that discusses the function of Near Field Communication (NFC) and the market opportunities it opens up to print businesses. This white paper was made available free to members and connects them to technology developments that could influence their businesses.

The **Automation Solutions Network (ASN)** held a successful meeting in February 2015 in Miamisburg, OH, hosted by Think Patented, a technically savvy commercial printer. Nearly 50 professionals gathered together for a two-day discussion of the implementation of automation processes and the business and technical cases for automation. For nearly a decade, these meetings have provided members with information and experience from industry leaders.

Moving into 2016, the Center for Technology and Research aims to grow attendance of the TAGA Annual Technical Conference and increase participation from both schools and professionals in these invaluable gatherings. Members also can look for **Qualified Lead Portfolio**, a new service from PIA that will combine PIA's industry knowledge, experience, industry access, and databases to generate well researched, high-quality, targeted sales and marketing leads.



ENVIRONMENTAL, HEALTH, AND SAFETY AFFAIRS UPDATE

The Environmental, Health, and Safety Affairs Department takes its name to heart, connecting with members as a “safety net” as they navigate myriad local, state, and national regulations regarding the printing industry.

The Environmental, Health, and Safety Affairs team responds to thousands of member questions and requests each year, providing support, tools, and reference documents as needed on a case-by-case basis. Members can learn about regulations that affect their operations and how to comply with requirements with the help of the EHS Department. Staff also assists with violation notices and OSHA citations by advising members on how to respond or challenge the notices as applicable.

MEMBER SUCCESS STORY:

A Printing Industries of America member was notified of an upcoming inspection by the Massachusetts Department of Environmental Protection to observe operations and emission records for the company’s air permit. Realizing the plant was not prepared for the visit, the member contacted EHS and, within a day, a staff member was on site, helping the member to update emission records and review the operation. The EHS staff person also identified areas of improvement in the operation to guarantee compliance with the air permit. Two days later, the inspector visited and the member passed with flying colors.

Other Environmental, Health, and Safety services provided to members include:

Presentations—EHS gave more than 20 presentations in 2015, including webinars, workshops, conferences, and seminars.

Compliance Assistance—Thousands of companies come to EHS for assistance on issues such as EPA, OSHA, CPSC, SGP, USDA, and sustainability. The department assists with issues and problems through on-site facility and operation assessments, phone calls, emails, newsletters, fact sheets, and listserv postings. Contact with members on these topics aids the EHS staff in educating themselves on the “real world” issues affecting members and providing expanded resources to address them.

Industry Representation—The EHS team constantly reviews proposed federal, state, and local regulations and interpretations to develop appropriate, technical responses, public testimony, and participation in public meetings.



Looking Back and Moving Forward

In 2015, the printing and graphic communication industry was faced with more proposed government regulations. Printing Industries of America continued to represent members at the federal, state, and local levels in regard to OSHA and EPA regulations.

- PIA has been actively opposing several onerous EPA regulations in particular, including the new Waters of the United States rule, ozone standard, and greenhouse gas emission reductions from power plants.
- PIA also continues to urge OSHA to withdraw its expanded injury and illness reporting standards, which contains vague language—especially in regard to amputations—that leads to over-reporting by the printing industry.

MEMBER SUCCESS STORY:

EHS saved a California member \$80,000 after a local sewer authority attempted to charge the company for a sewer connection. By working with the facility and the authority to examine the actual and projected wastewater discharges, the EHS team convinced the sewer authority that some of its assumptions were incorrect and helped the member discover inefficiencies in its reverse osmosis treatment unit.



- States have been actively adopting the new air pollution control regulations and the EPA's new shop towel rule. In fact, 26 states have either adopted both rules or are in the process of adopting them. The EHS Department put significant effort into the development of Virginia's revised air pollution control regulation for printing operations, working with Massachusetts on the air permitting of digital presses, streamlining air permit requirements for printing operations in North Carolina, reducing recordkeeping burdens in New Hampshire, and continuing to work with Wisconsin on the implementation of a less burdensome environmental regulatory program.

With OSHA's focus on the printing industry (due to its being deemed a "high hazard industry" for amputations), many inspections of printing operations have occurred and will continue to do so. EHS supports members in this process with:

- The development of education pieces, such as the revised OSHA Primer publication.
- Individual customized assistance in preventing injuries, avoiding citations, and responding to citations when they are received.



- Assistance with air permitting, wastewater discharge permitting, and various environmental reporting requirements.

In the past year, the EHS Department added several new pieces to the safety poster series, covering how to read the new GHS labels under the revised hazard communication standard and best management practices for solvent contaminated wipes.

OSHA will be increasing penalties by up to 80 percent in the coming year, so responding to OSHA's continued focus on the printing industry will continue to be a major priority. The EHS team plans more OSHA Compliance Essentials programs in the coming year, as well as a series of webinars to educate members about OSHA's requirements and how to avoid noncompliance.

Along with the national regulations, EHS will continue to work on the state and local level, as regulatory development will increase as a result of the EPA's new rule on the ozone standard. Many states will look to develop and implement new air pollution control regulations. The remaining states that have yet to adopt the EPA's new solvent contaminated wipes rule will be proposing and finalizing their regulations. The EHS team will be there to support our members' best interests in these and all environmental, health, and safety issues.

MEMBER SUCCESS STORY:

The Graphic Arts Association and Printing Industries of America helped a member facing an OSHA citation and large fine for not installing a guard on a stand-alone box stitcher. The citation was challenged successfully on the basis that the operator was two feet away from any potential hazard. OSHA acknowledged the lack of exposure for the operator and rescinded the citation, saving the company thousands in fines.



BUSINESS DEVELOPMENT UPDATE

The Printing Industries of America team manages a strong portfolio of key member-focused programs. With the creation of the new Business Development Department in 2015, **PIA begins its focus on building upon this solid product portfolio to increase non-dues revenue.** This is a significant new approach to create an ongoing growth strategy for the organization.

Business Development focuses on establishing and implementing strategies and plans to connect PIA to partnerships, sponsorships, product development opportunities, and other revenue instruments.

Looking Back and Moving Forward

In its first year, the department focused on assessing immediate business development capabilities and developing a foundation to increase sponsorship and non-dues revenue. Initial efforts included:

- Developing a base of organizational and industry knowledge
- Assessing the business development infrastructure and critical needs
- Identifying and evaluating organizational assets
- Developing and implementing business development strategies and plans
- Initial relationship building with past and potential sponsors, partners, and customers

This strategy provides the foundation and structure needed for PIA to effectively leverage a substantial portfolio of assets to drive non-dues revenue.

In 2016, PIA's business development strategy is focused on driving revenue by executing an Action Plan that focuses on the following growth strategies:

Market/Account Development and Penetration—Selling more current products to new customers, partners, and sponsors

Product Development—Developing new products to sell to existing and new customers, partners, and sponsors

New Products for New Customers—Creating customized products for new customers, partners, and sponsors

Alternative Channels—Pursuing customers, partners, and sponsors through different channels and in new ways

HARRIS FLOYD, VP OF BUSINESS DEVELOPMENT





CENTER FOR PRINT ECONOMICS AND MANAGEMENT UPDATE

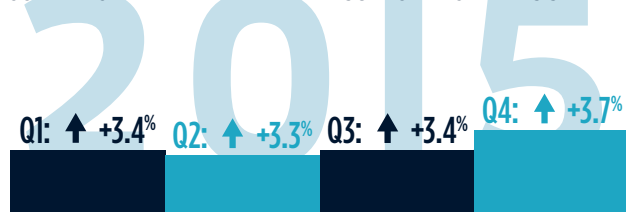
No printing company is an island. Connecting to others in the graphic communication industry allows for vital evaluation and metrics to build on its success, strengths, and opportunities. Printing Industries of America's **Center for Print Economics and Management** provides critical tools to allow members to assess their performance against their peers and the industry as a whole. Those important tools available to members include:



The Ratios—This program helps members to evaluate their operations and increase profits, as well as allow PIA to track industry performance on a year-to-year basis.

Economics and Print Market Outlooks—The Center provides members with updates on the economy and print markets and the outlook for the economy and print markets. This allows members to improve their strategic planning and investment decisions and establishes PIA as the most accurate industry forecaster!

COMMERCIAL PRINT AND RELATED SUPPORT ACTIVITIES SHIPMENTS:



Flash reports—These reports provide ongoing updates on various industry management issues, helping members to stay current on industry trends.

Special Report: Industry Briefing: Competing in Print's Dynamic Marketplace in 2015—This detailed report provides insight into the industry's economic, financial, and management issues and recommendations on actions for improvements. Members can use it to understand the current print macro-environment and develop their own business plans for the coming year.



MEMBER SUCCESS STORY:

"The Ratios studies are a road map to better financial management of a printing company," said Jim Hopkins, CEO of Hopkins Printing. "Without them, we would be lost as to how we are doing compared to the rest of the industry."

Looking Back and Moving Forward

During 2015, the Center for Print Economics and Management built on the success of the proprietary research it has supplied to member printers and suppliers over the past few years with research services on some new direction programs, including:

- Analysis for selected states on the extended impact from print in those states.
- Direct and indirect impact of printing on related industries, wages and salaries, and state fiscal operations.

In the coming year, the Center plans to expand this research to the entire United States, helping affiliates in their state lobbying activities and national governmental affairs programming.

Also in 2015, the Center for Print Economics and Management developed or re-developed several key programs that provide members with tools for benchmarking and assessment of fiscal performance:

- **NEW Dynamic Ratios:** The Ratios provide members with financial and operational performance metrics so they can benchmark their performance against industry profit leaders. In 2015, the department re-invented the *Ratios* as the *Dynamic Ratios*. The new program features a shorter, easy-to-use survey form, new Key Performance Metrics, and a new interactive dashboard that gives members online access. *(The new program will debut in 2016.)*
- **NEW Financial Performance Assessment Program:** This new program provides members with an expert, customized assessment of their performance in terms of selected strategic, operational, and financial metrics. The customized report provides specific recommendations for profit improvement.
- **NEW Focus on Printing Firm Management:** PIA's Center for Print Economics and Management formed a strategic partnership with the Department of Management at Middle Tennessee University to conduct research to develop new insights to effective strategy and operational management in the printing industry.

Going forward, the key focus area for the Center is set to be around issues of managing printing firms. A new publication, **Best Management Practices in the Printing Industry**, is anticipated for publication in 2016, following a comprehensive survey with the Department of Management at Middle Tennessee University. This publication centers on both strategic and tactical management practices and, in particular, on family business issues since many printing business are family-owned and operated.

GOVERNMENT AFFAIRS UPDATE

A connection to government officials, offices, and regulators is absolutely critical to Printing Industries of America, its affiliates, and members. In 2015, new Government Affairs Chair Doug Rawson hosted a facility visit by his member of the U.S. Congress following a meeting with her in Washington, D.C. at Print's Voice 2015. This experience was extremely positive for the department and strengthened connections to critical decision makers in Washington, D.C. Other services provided to members by the Government Affairs team include:

Direct Lobbying—Our work on tax policy is beneficial to small and mid-size printers, resulting in a cost savings to members.

Grassroots Lobbying—We demonstrate the job impact on the industry of postal and tax issues, helping lawmakers to support PIA-backed positions.



Political Advocacy—PIA works to elect action-oriented Congress members, ensuring a willing ear and interest in printing/manufacturing viewpoints on legislative issues.

Special Events: Print's Voice—This annual event includes dozens of face-to-face meetings between PIA members and Congress members, allowing PIA to deliver persuasive, first-person messages on behalf of the industry in relation to key issues such as an “ad tax” and pro-growth economic/postal policies.



Looking Back and Moving Forward

Government Affairs counted among its accomplishments in 2015:

Launch of the Consumers for Paper Options (CPO) Coalition—This organization made up of supply chain connections—from paper mills, to printers, to customers—works to preserve paper-based information and services to citizens in an increasingly digital-only world.



Support of #HowLifeUnfolds Campaign—This is a “check off” program promoting paper and paperboard products. The public affairs campaign is directed and funded by allies in the paper manufacturing industry and serves to promote the inherent value of paper and print in today’s society.

Print's Voice 2015—The annual Capitol Hill Fly-In was hosted by PIA and allied organizations in the vendor community via NPES.

In 2016, the department plans to achieve:

- Pro-growth tax policy (*bill introduction/precursor to 2017 comprehensive reform*) and postal stabilization efforts for USPS in advance of its 2017 rate-setting process review
- Galvanization of PIA members of all stripes to oppose an attempt to reduce or ban deduction of advertising services
- Election of pro-print, pro-growth, and industry champion lawmakers via PrintPAC.





HUMAN RELATIONS UPDATE

Printing Industries' Human Relations Department works with member companies daily to help navigate and develop policies.

Here's an example from 2015. A member contacted department staff to ask about bereavement leave policies pertaining to miscarriage. The staff did not have any existing policies on file from other printers but found various examples from other industries. After some research and discussion, it was determined that the member had the right to add such a circumstance on the fly, and there was no state law that would prohibit such a change.



MEMBER SUCCESS STORY:

A company was looking at competitive cost issues and emailed the HR staff requesting information about the industry standard for overtime practices. While there is no "standard" for overtime because of state law and local market practices, the staff emailed recent industry survey results and five sample overtime policies from printers.

Human relations management is vital to the success of any business. For many printing companies, connecting their employees to the company in a beneficial way can require resources and experience beyond what they possess. Printing Industries of America's Human Relations Department can connect members with the resources they need when they need them.

Other services provided to members to assist with human relations issues include:

Webinars and Seminars—The HR Department provided more than 20 webinars and seminars in 2015 to members nationally and

locally—all with HRCI recertification credit. More than 500 members benefited from these HR, health care, and labor updates, as well as federal and state law compliance information.

Full-Time HR/Labor Consultant—PIA is the only printing industry trade association with a full-time HR/labor consultant on staff to field member questions, with over 25 years of experience. In 2015, HR fielded more than 240 member requests.

HR Page on PIA Website—The HR page is a one-stop shop for members with common HR questions and resources, including more than 200 job descriptions, dozens of performance appraisals, links to state and federally required posters, articles, recruiting advice, performance management, government compliance, and advice on handling layoffs. It is one of the most frequently used resources by members online.

Looking Back and Moving Forward

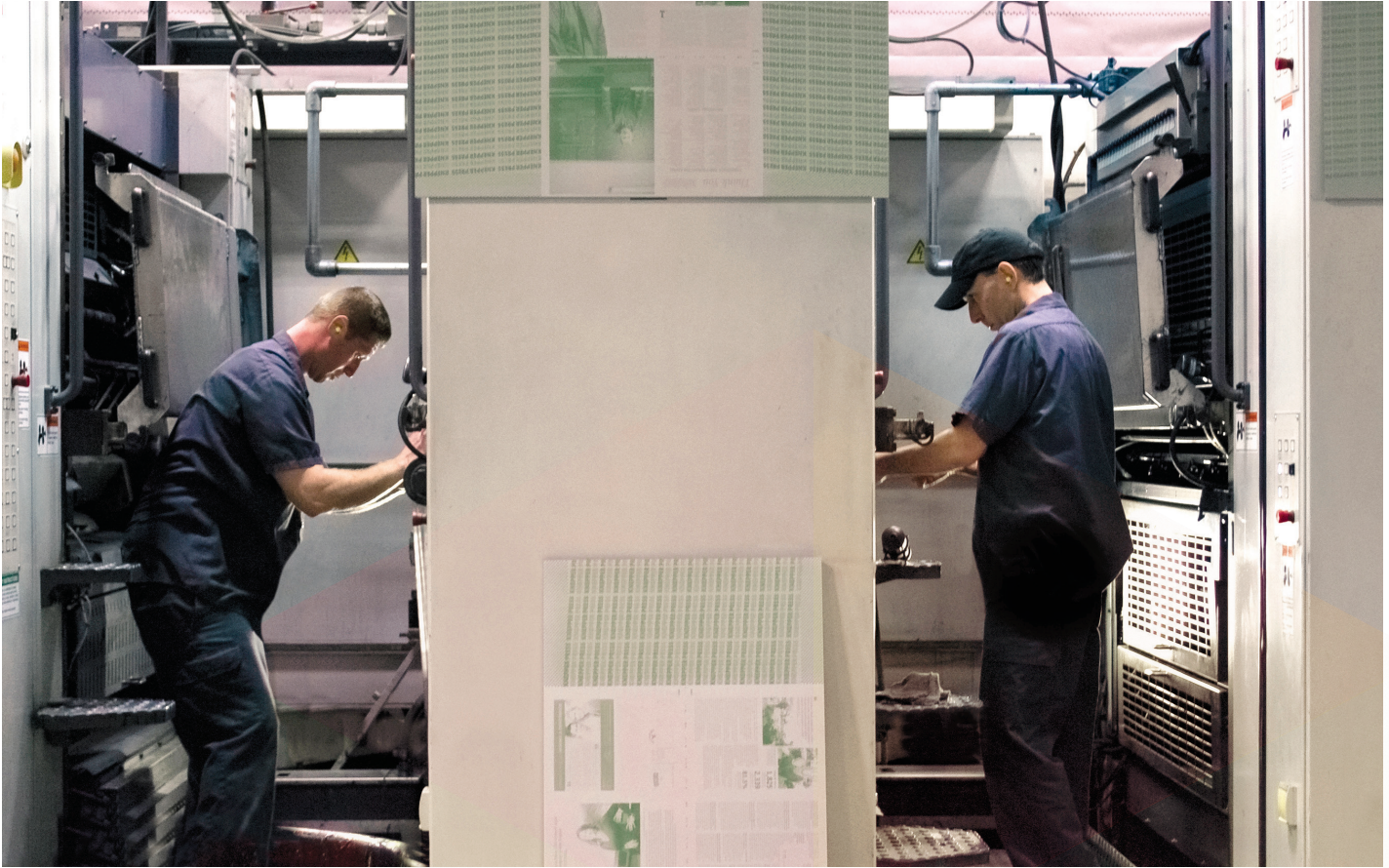
In July 2015, the Wage/Hour Division of the Department of Labor (DOL) issued a proposal to revise the overtime exempt regulation for the first time since 2004. The proposal made just a few suggested changes, but they were significant, such as a doubling of the salary threshold from \$23,660 to potentially \$50,440 per year. **PIA commented on the regulation, noting that the proposal would be a shock to the market and result in job loss.** Despite BLS/Census wage statistics



that DOL was using as a guide for the new salary level, the Office of Management and Budget modified the regulation before publication and lowered the salary threshold to \$47,476, effective December 1, 2016. DOL also asked for suggestions by the public for additional occupations to add to the regulation that could be exempt from overtime (with certain conditions). PIA wrote comments suggesting



HUMAN RELATIONS UPDATE



MEMBER SUCCESS STORY:

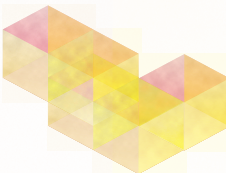
A member company contacted the HR department looking for human resources metrics for the printing industry (*turnover, absence rate, time-to-hire*). The staff provided a link to the HR Quarterly Metrics page on www.printing.org and invited the member to participate in future surveys. This member is now an engaged participant in the HR program.

that printing industry customer service representatives (CSRs) should be written into the regulation (if the employer chooses). PIA cited case examples of where CSRs in the printing industry were deemed exempt by wage/hour investigators. (Note: state law could override the CSR determination, e.g. California). PIA's HR Department urged members to submit public comments as well, with a sample letter provided by PIA. DOL issued the final regulation in May 2016 and decided that printing industry CSRs are not covered by the regulation.

In 2015, HR staff began offering employee handbook reviews that include state law compliance checks for only \$199. Sales compensation plan reviews and critiques also were added. Several members have taken advantage of this new service and have saved hundreds or thousands of dollars in legal bills.

Also in 2015, the HR Department developed new and updated presentation content on wage/hour compliance, employee handbook topics (such as on "Social Media" and "Bring Your Own Device" policies), and recruiting.

In 2016, the HR Department is on track to give more than 30 presentations to PIA affiliates, members, and other printing industry groups.





MARKETING AND EDUCATION UPDATE

At the end of 2015, the Marketing and Education Departments were merged to form a new super department dedicated to outreach, communication, and education. Some of the key events and programs rolled out under the education and marketing communications banner include:



Print Leadership Summit/President's Conference—The 2015 Print Leadership Summit ran May 18–19, 2015 in Minneapolis, MN, and was co-located with the BIA Annual Conference with a combined attendance of 172. The program was strong with positive ratings from attendees, and while attendance numbers were not as high as anticipated, the consensus of the Board is that this was due primarily to the May timeframe of the event. At the advice of the Board, we have revised the President's Conference brand, and in 2016 this will be our primary leadership event.

POWER SELLING PROGRAM CLOSE.THE.DEAL. LESLIE GROENE

Power Selling Program—The Power Selling Program is a new eight-week turnkey training program featuring a unique combination of online training, weekly student projects, and live coaching sessions with sales coach superstar **Leslie Groene**. Through the new program, printing firms have the opportunity to enhance their sales revenue by improving the effectiveness of the sales team. The goal of the **Power Selling Program** is to energize a company's sales associates, sales managers, and senior executives. The program promises to expedite onboarding of new sales staff and increase sales results of existing staff through training delivered in a cost-effective and efficient way. Participants attend personalized weekly coaching sessions with Groene where they can ask questions and get answers in real time. Although PIA members receive significant savings on the Power Selling Program, the package is also available to nonmembers. The program kicked off on October 12, 2015, and, because there are private coaching sessions, participation is limited to 20 companies during any given eight-week run.



iLearning Center—The iLearning Center provides online workshops on topics that matter most to graphic communication professionals with an ever-growing range of topics of interest to production personnel, sales, marketing, customer service representatives, and business owners. The courses vary in length, with some that can be completed over a lunch hour and others that may take a full week of lunch hours or more to finish. That's the advantage of self-paced online training—it's available for students whenever they have the time to take it. (www.printing.org/ilearning)



Printing Industries Press—YUDU/Printing Industries Press mobile app was launched in spring 2015. This convenient tool makes it easier than ever to expand members' knowledge on the most vital graphic communications trends and tactics. Printing Industries Press Mobile App allows users to do the following:

- Preview publications in business, training, technology, and more
- Download and purchase right from a mobile device
- Access conference brochures and handbooks before and during the event
- Experience video and audio playback as well as search, highlight, and take notes



MARKETING AND EDUCATION UPDATE

Through this app, Apple and Android mobile device users are able to access digital versions of our most popular titles (with more being added regularly) as well as free resources (including *Seven-Minute Solutions*, conference brochures and handbooks, *Marketing Minutes*, etc.). Key features of the app include:

- Publications retain page numbering and design features, ideal for classroom use
- Mark up publications with highlights, notes, and voice recordings
- Keep these mark-ups through the same publication on multiple devices (smartphone, tablet, laptop, and desktop computers)
- Receive updates from authors free-of-charge through push notifications (i.e., new postal rate charts can be made available to *Direct Mail Pal* as they become available)

Apple users can download the app at the iTunes Store. Android users can visit the Google Play Store and search the Printing Industries Press App to download.

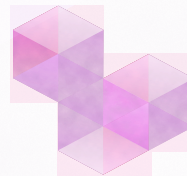
Publications—Marketing and Education continues to partner with outside publishers to offer books and reports that will benefit members. This includes *Pocket Pal*—a perennial best seller. In 2015 we added the following reports to our stable of reseller offerings:

- *Value-Added Printing & Finishing for Improved Profitability* (PRIMIR)
- *What Does Media Mean to You?* (The Graphic Communication Institute at Cal Poly)
- *The Printing Sales DNA Project* (Dave Fellman)
- *The Color Printing Revolution* (Gary Field)

Looking Back and Moving Forward

In 2015, the Marketing and Education Department continued to focus on the iLearning Center to great success as expanding our online educational programs is paramount looking into the future. At the strong suggestion of our affiliate network and members, we will launch our first certification program in 2016 around the topic of continuous improvement. In addition, the department has several ambitious goals:

- Enhance content management and develop further tools for affiliates to promote the benefits of membership.
- Membership growth continues to be the number one priority of all affiliates and Printing Industries of America. This initiative will focus on PIA continuing to provide tools that can be utilized at the affiliate level to recruit and retain members, including developing a content marketing plan.
- Content marketing is a strategic marketing approach focused on creating and distributing valuable, relevant, and consistent content to attract and retain a clearly defined audience—in this case, members. Printing Industries of America has an arsenal of content but has not necessarily distributed this material in a cohesive, effective manner.
- As part of this key initiative, a microsite will be developed for affiliates to access, where they can easily obtain all marketing pieces, articles for newsletters, ads, and other valuable content. This will supplant the current online access point with a more user-friendly alternative.





FINANCIAL REPORT UPDATE

Combined Statements of Financial Position December 31, 2015 and 2014

	2015	2014
Assets		
Current Assets		
Cash	191,315	622,579
Accounts receivable	525,283	676,301
Inventory	79,373	89,186
Prepaid expenses	69,958	54,112
Investment in GASC	37,650	43,900
Total Current Assets	903,579	1,486,078
Investments	8,410,095	8,867,141
Land, Building and Equipment, net	398,504	472,625
TOTAL ASSETS	9,712,178	10,825,844
Liabilities and Net Assets		
Current Liabilities		
Accounts Payable & Accrued Expenses	405,010	590,456
Deferred Revenue	131,797	59,447
Current Portion of Long-term Debt	0	0
Total Current Liabilities	536,807	649,903
Long-term Debt	0	0
Total Liabilities	536,807	649,903
Net Assets		
Unrestricted	9,175,371	10,175,941
Temporarily Restricted	0	0
Permanently Restricted	0	0
Total Net Assets	9,175,371	10,175,941
TOTAL LIABILITIES AND NET ASSETS	9,712,178	10,825,844

Combined Statements of Activities For the Years Ended December 31, 2015 and 2014

	2015	2014
Change in Net Assets		
Revenue		
Membership	840,062	902,216
Group Buying Program	503,597	730,424
Awards	210,338	244,908
Marketing	0	33,309
Education & Training	514,272	546,536
Industry, Career, and Core/Sections	15,420	15,355
Internet Communications	33,307	30,635
Economics	71,285	51,482
Human Relations	21,398	22,867
Administration	23,488	13,412
Exhibits	742,000	865,000
Special Interest Groups	99,447	112,071
Publications	108,955	153,451
The Magazine	62,343	64,027
Research	832,440	768,178
Environmental	85,291	76,060
Integrated Print Center	37,467	35,221
Building and Related	0	1,091,274
Investment Return	(126,778)	237,269
Other	61,200	57,000
Total Revenue	4,135,532	6,074,695

Combined Statements of Activities Cont.
For the Years Ended December 31, 2015 and 2014

	2015	2014
Change in Net Assets		
Expenses		
Membership	91,537	90,914
Group Buying Program	315,788	452,402
Awards	168,384	152,637
Marketing	329,810	367,039
Conference & Training	288,321	338,685
Industry, Career, and Core/Sections	12,792	12,943
Internet Communications	60,293	61,653
Economics	206,632	211,211
Human Relations	118,524	118,230
Government and Public Affairs	440,814	584,924
Administration	1,035,087	1,388,139
Exhibits	6,250	6,250
Special Interest Groups	122,811	129,048
Post Retirement Benefits	12,000	18,000
Designated Programs	68,474	8,856
Publications	99,929	194,752
The Magazine	138,401	136,000
Research	811,067	784,979
Environmental	211,263	202,711
Integrated Print Center	222,822	244,557
Building and Related	313,775	388,218
PGSF	61,328	57,023
Other	0	0
Total Expenses	5,136,102	5,949,171
Change in Net Assets	(1,000,570)	125,524
Total Change in Net Assets	(1,000,570)	125,524
Net Assets, Beginning of Year	10,175,941	10,050,417
Net Assets, End of Year	9,175,371	10,175,941



Bay State Envelope

CHROMiX

Enfocus

GTI Graphic Technology, Inc.

Heidelberg USA, Inc.

KMBS

Q-Lab Corporation

Remote Director

Sinapse Graphic International

Techkon USA

X-Rite Incorporated

Printing Industries of America would like to thank those companies that had equipment at the Headquarters in 2015.

The Printing Industries of America Center for Technology and Research contains equipment that drives the research, training, and development of process control devices vital to the printing industry.

Workflow Management Systems:

CHROMiX Curve 2

Contract Color Soft Proofing:

Remote Director

Training:

Sheetfed Offset Training Simulator (SHOTS), S.I.R. Heatset Web Offset Training Simulator

Densitometers and Spectrophotometers:

Datacolor Spectraflash SF600, Gretag SpectroScan, Gretag Spectrolino, Gretag SpectroEye, Gretag D196, Gretag SPM60, Konica Minolta FD5, Techkon SpectroDen, X-Rite eXact, X-Rite EyeOne iO, X-Rite 530, X-Rite 939, X-Rite IntelliTrax, X-Rite DTP70

Plate Readers:

Acme Plate Reader, X-RiteDot, Beta Screen Ultra Dottie, Techkon DMS 910, Gretag iCPlate, Tobias Plate Check

Register Analysis:

Portable Digital Register Analysis

Material Tests:

Ink tack, viscosity, ink washout, fineness of grind, color strength, volatile organic content, opacity, basis weight, caliper, stiffness, tensile breaking strength, tear resistance, coefficient of static friction, opacity, brightness, porosity, gloss, moisture content, ash content, surface pH, smoothness, water absorbency, surface strength, Consolidated Tri-Pick, paper absorptivity, emulsification, ISO verification, SWOP verification, ink setting, print analysis, digital photomicrographs, ink mileage, blocking, fade resistance, rub resistance, tensile page strength, page flex strength.



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- * = 1st Term
- ** = 2nd Term
- *** = Interim Period



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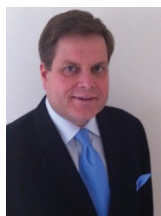
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Advancing Graphic Communications

AN AFFILIATE OF PRINTING INDUSTRIES OF AMERICA

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