PRINT

INDUSTRY

IN

ST. CLOUD

MINNESOTA

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Using the Michael Porter’s Diamond Theory, we discovered interrelated influences in the Printing Industry in St. Cloud. Here are our findings:

**Results according to the Porter Diamond Advantage Theory**

- **Factor Conditions** included a skilled labor force, long-standing history of profitable printing businesses, access to education and training providers, a diverse economy, and a favorable physical infrastructure.

- **Firm Strategy & Rivalry:** The printing industry has a diverse cluster of interrelated firms that compete and cooperate in a “flexible manufacturing network.” The SCPA supports healthy relationships and PIM advocates favorable policies. Automation has allowed printers to do more with fewer employees and has mitigated the impact of stringent environmental regulations that affect printers.

- **Demand Conditions:** National demand accounts for business growth for large firms (more than 500 FTEs); the local market is the largest customer segment of small and midsize firms. Technological advances in the printing industry and customer expectations have expedited turn-around times.

- **Related and Supporting Industries** have thrived due to the concentration of printing firms in a small geographic location. Key suppliers of paper and ink located in the metro area are able to deliver products daily at a more cost effective price to the St. Cloud area. Continual training is required in the printing industry and the SCPA is working with the local educational facilities and the WorkForce Center to meet the ever changing skills in demand.

**Cluster Map and Value Chain**

A unique dynamic in this cluster is that because the smaller printers serve the local markets, they do not have to compete head on with the larger firms. Varying types of equipment, for example web- or sheet-fed presses, allow printers to specialize and expand their market. The Value Chain represents how the printing industry creates its competitive advantage. Unique to the printing industry is the placement of customer service as a leading function of getting the sale and exceeding customer expectations.

**Government**

Three key issues that impact the viability of this industry cluster are postal rates, capital equipment sales taxes, and health care costs.

**Recommendations**

Our recommendations are based on human capital needs, specifically education and training:

- SCPA, Quebecor and St. Cloud Technical College (SCTC) revisit the purpose of the Quebecor World Project to identify what implementation problems need to be solved so that peer incumbent workers can access the training.
- SCPA begins the conversation with SCTC to determine the viability of courses in production and finishing, and align resources and strategies to grow enrollment. Further, we recommend this merged group address the feasibility of an internship curriculum that would put SCTC students on the shop floor as part of their coursework.
- SCPA initiates invitations to teachers, students, and their parents to tour its member facilities. Tours should include a hands-on component of production (for student participation) and information on wage and benefit opportunities (meaningful to parents). A specific effort should be made to reestablish the relationship with Wright Technical Center. Relationships with secondary schools should include contact with SCTC to attract potential students to the St. Cloud area.
- SCPA, as well as individual enterprises, establish and maintain an ongoing relationship with the St. Cloud WorkForce Center and communicate its specific workforce needs, and access the Manufacturing Industry Specialist, Debra Bultnick, for longer-term workforce development programs and resources.
The birth of the printing cluster in St. Cloud began with seven local, successful entrepreneurs:

With roots going back to 1854 when **George Washington Benedict** and **Jeremiah Russell** founded *The Frontiersman* in Sauk Rapids, the **Sentinel Printing Company** is one of the longest-lived businesses in the St. Cloud area. Sentinel printed newspapers for decades, but now has moved to printing expertise in producing paperback and hardbound books as well as phone directories and manuals.

In 1915, **Albert L. May** invested his entire wealth ($500.00) into the **May Printing Company**. He combined his capital with his commitment to quality and natural sense for business to grow May Printing into one of the most respected and versatile printers serving the Twin Cities, and making it a benchmark of quality in St. Cloud (1993 acquired by Merrill Corporation).

**Jack Rengel** and his friend and fellow printer, **Andy Goedert**, started their business, Goedert and Rengel (later **Rengel Printing Company**) in 1921. They set up shop with used equipment purchased from the struggling Pan Motor Company on the second floor of the Journal-Press Building. With the newspaper on the ground floor, orders flowed in immediately and steadily. Their firm persevered during the Great Depression and Rengel remained active in the operation until his death in 1982. A third generation is currently preparing to continue this printing legacy.

**Anton Volkmuth** came to St. Cloud from Bavaria in 1921. His first job was cutting ice on Lake George during the winter of 1921-22. After more than 15 years as a printer with other firms, Volkmuth established his own weekly publication and founded **Volkmuth Printers** (1938), a commercial printing plant. In the beginning, Volkmuth operated the St. Cloud News which eventually became the Shopping News. In 1958, he sold his business to his three sons but continued to work for them. And
in 1962, Volkmuth played an important role in changing the Shopping News to the Photo News, making it the largest weekly newspaper in Minnesota. The sons sold the weekly to William Moline a year later (since acquired by Quebecor Printing).

**W.E. Clemens**, a North Dakota native was to attend college at St. Thomas but, not finding suitable housing, instead chose to enroll at St. John's University. After graduation and a four-year Navy tour, he returned to St. Cloud and, following a stint as an on-the-road salesman for another firm, Clemens founded **Bankers Systems, Inc.** (1952). He focused his firm on specializing in manifold business and legal forms used by financial institutions. An example of the product line includes forms and manuals for use in administering IRAs, mortgage loans, and other financial services—all of which must be customized to each state’s laws and regulations (since acquired by Wolters Kluwer).

**Louis Rothstein** dreamed of owning a one-man (himself) press shop (his garage). Continental Press (1948) had one problem—Rothstein had the press but he was not a pressman. So he hired his first employee—a pressman, of course. The garage shop evolved into a modern business with expertise in corporate identity items sold in all 50 states. The company is owned and operated by the third-generation Rothsteins.

**Jim Nahan** worked six years as a printer apprentice and another eight years as a newspaper compositor before acquiring the equipment of a small and failing one-room basement print shop. **Nahan Printing, Inc.** (1962) was born. Jim and wife Helen grew the business to what is today a 300,000 square foot state-of-the-art facility serving customers around the world. Nahan Printing is still a family-run business with their adult children, Mike, Linda, Danny and Tracey, at the helm.

Many other printing businesses began as spin-offs from one of these seven businesses. Some have been acquired by other businesses, some have failed, and some are still viable players in the industry. There are now 39 printing businesses employing nearly 3,500. The cluster has grown to the point that virtually any printing process need can be met by a business in St. Cloud.

*Number of printers and their employees in St. Cloud (est.)*
The number of printing businesses in the St. Cloud area has remained level for over five years. The number of full-time equivalents (FTEs), currently estimated at 3,929, is nearly on par with the pre-9/11 height of 4,035.

The near future of the local industry will experience change as ownership transfers from one generation to the next. Several key printers (sales of $ .5M-$4M) are transitioning now.

The following sections of this report will address the four diamond factors, the role of government, a representation of one printer’s value chain, and our recommendations for sustaining this important cluster in St. Cloud.

*The Factors of Competitiveness Diamond*
Access to a highly skilled labor pool is cited as a key factor for keeping businesses in St. Cloud. Programs are offered by the local technical college and its customized training department. A fee-based website devoted to jobs in the print industry, Printworkers.com, is another source of potential workers. However, the area is not always able to attract and retain workers from outside the immediate area. For example, students from UW-Stout that complete print internships in St. Cloud most often go elsewhere to work once the internship is completed. Information about education and training specific to the print industry is addressed later in this report. It should be noted that some see parts of this industry transitioning from craftsmanship to a customer service function as advances in technology close the gap between the customer service representative and the press operation. Thus, the skills most in demand now, those required by press operators as an example, may be obsolete in all but those printing businesses using current production technology.

The St. Cloud community boasts both a technical college and a state university among its educational and training institutions and consequently, the general population is well educated.

Along with its education providers, the overall strength of the St. Cloud economy is a result of the diverse players. Important industries are healthcare, manufacturing, hotel/restaurant, professional services (law firms, finance, and the like), and retail businesses.

There are active printing associations in Central Minnesota. They include the St. Cloud Printers Association (SCPA), the Central Minnesota Printer Professionals, part of the larger International Association Print House Craftsmen, and Printing Industry of Minnesota (PIM).

Central Minnesota has the physical infrastructure to support this cluster. Relative land prices, land availability, and construction costs are favorable to expansion. St. Cloud’s proximity to Minneapolis and St. Paul area
(less than 60 miles to western edge) along with good roads and multiple routes to the Twin City metro and to Greater Minnesota as well as direct access to rail means supplies get in and product gets out with ease.

The historical presence of this industry as noted above sets the stage on which these current factors are played out. Bob Byers, vice president of operations at Sunray Printing Solutions, predicts that the number of printing businesses nationwide will decrease by 50 percent in the next ten years. This will come disproportionately from the small ‘mom and pop’ shops who will not be able to make the capital investment to upgrade equipment with the advancing technology that has greatly reduced turnaround times. Faster turnaround times are a key customer expectation and only those printers able to meet the customer demand will survive.

As some printing businesses dissolve, remaining businesses will absorb the experienced workers. It’s expected that these workers will choose to remain in the printing industry. According to Bob Byers, “the ink gets in your blood.” Less competition could drive up prices—and profits—for printers in a market that has been very flat after 20 years of downward pressure. Turn around time and service will drive profitability.

STRATEGY & RIVALRY

The St. Cloud print industry is an “Italianate” industrial district (the type found in northern Italy consisting of firms that are roughly equal but that both compete and cooperate. For example, a firm that has more work than it can currently handle or more workers than it can currently employ may give the excess work or refer the excess workers to another firm in the district (Markusen (1996)). In addition, there is great cooperation between most printers demonstrated by the willingness to share resources (paper, ink, etc.) and expertise (help running a troublesome piece of equipment). Thus, peers are both customer and supplier in what has been referred to as a “flexible manufacturing network.”
The active SCPA spawns healthy relationships and, at the state level, PIM advocates for favorable policy.

Clearly, for cooperative competition to occur there has to be a high level of trust between cluster participants. Given the generational and long-standing community history of the cluster, strong family, social and business relationships have supported positive competition.

The resulting benefits in terms of competitive advantage are the ability of each business to respond favorably to customer demands that might otherwise be prohibitive if these relationships did not exist. Printers know their competitors’ capabilities. Service, speed and cost are the differentiators for all, plus specialization for most. In fact, virtually any printing need can be satisfied in St. Cloud because of the diversification of specialization.

Technological advances in the design, production and delivery have had a positive impact on printers’ ability to do more with fewer employees. Many times these advances require specialized employees. Semper International, operating a branch office in Minneapolis, is a temporary technical skills firm that places highly-trained technical people in printing positions lasting from two weeks to full-time employment. Semper has indicated it plans to expand to St. Cloud.

New equipment that incorporates the latest technology outperforms less advanced machines. Smaller printers may lose their competitive advantage if they cannot upgrade equipment.

Minnesota printers buy both new and used equipment from German manufacturers. While China and Japan also produce printing equipment, Germany is considered the leader in that field. In Germany, new equipment fully depreciates after three years. The United States allows full depreciation only after five years. Additionally, most German printers run a daily eight-hour shift, as opposed to the 24/7 machine operation time common with St. Cloud printers. These two attributes, “younger and with lower mileage,” make buying used equipment from Germany a double value for Minnesota printers.

Technology and demand drives emerging trends. One such trend is security printing, whereby holograms that contain personal information are printed on cards. The embedded information can only be accessed by an appropriate scanner. Applications range from bonds and securities, to ACT testing.

A key regulatory challenge involved the hazardous waste that resulted from production processes. The Minnesota Pollution Control Agency (MPCA) has very rigorous standards to protect the lakes, soil and air. The advent of soy-based inks, safer chemicals and cleaner processing
methods, as well as the use of a third party support business to handle disposal have so facilitated compliance with Minnesota’s stringent regulations that printers report it is a non-issue.

DEMAND CONDITIONS

A recent University of California at Berkeley report estimated that the overall amount of digital and print information produced each year will be eight times higher in 2009 than it was in 2001.

For small to midsize printers in St. Cloud (1-500 FTEs), local demand can account for as much as 90 percent of their total customer base. Key local customers are the state university and state college, as well as spillover from their competitors. The proximity of this cluster to the Twin City metro makes customers there “local” as well. These local customers that include noted colleges and universities, financial institutions, advertising and public relations firms, and world class healthcare facilities are very savvy about industry trends. Printers are driven to meet the high expectations of their customers.

The local demand has been strong enough for a great deal of specialization to occur among the actors in this cluster. In fact, the competencies of this cluster have broadened to the point that virtually any printing process need can be met by a business in St. Cloud.

The largest of this cluster’s businesses (more than 500 FTEs) have more than 50 percent—even as much as 95 percent—of their product delivered to customers beyond the local area. Many have customers around the world. Quebecor, for example, does not consider the local market to be a customer segment for its products. It is the national demand that accounts for business growth for these printers and the local market for them is flat or has relatively no impact.

The trend to which all printers regardless of size must adjust is customer demand for excellent service. Turn-around time is crucial to meet-
ing customer expectations. Successful printers will view their business not as a manufacturing process but as a service industry that provides printed products. As technology advances, we may see the day when customer service representatives actually run the presses with a push of a button.

**RELATED & SUPPORTING INDUSTRIES**

The print industry in Central Minnesota supports a broad range of related businesses including transportation providers, mailing houses, and advertising agencies. Likewise, the industries that support printers include suppliers of ink, paper, chemical, metal (plates) and film. Most printers have one or two main suppliers (Pitmann and Fuji Films) with three or four additional for specialty paper and ink (Midland Paper, UniSource Paper, Central Ink, Sun Ink, Flint Ink).

Another key supporting industry is in/outbound transport. Whether delivery is across the street or to the coast, shipping needs are often met by local providers: Spee-Dee Delivery Service and Central Minnesota Delivery (both based in St. Cloud), Scherer Trucking (St. Joseph, MN), and King Shipping (Rogers, MN).

Suppliers of prepress services include Fuji and Screen, and finance partners include Stearns Bank, Bremer Bank, and US Bank, to name a few. There is no evidence that having Versa, an international paper producer located in St. Cloud, draws customers to print in St. Cloud.

Education courses in the print industry fall into the three areas of prepress, press, and finishing. Prepress is the series of operations involved in the preparation and assembly of all copy elements and materials to be reproduced on press. This includes processes such as high-quality color scanning, color correction, monitor calibration, digital image manipulation, preflighting, electronic imposition, proofing an outputting a job to film, plates or direct to digital press.

Press is the process of using machines to print large quantities of jobs
on paper. The press areas include lithographic press operation, multi
color printing, quality control using densitometry, plate making, chemical
use and safety, and machine maintenance. The completed printed job is
moved to finishing for its final production (assembly, bindery, etc.)

Printers in St. Cloud use five educational institutions that provide
courses in printing and publishing. **St. Cloud Technical College** (SCTC)
offers a Graphics Communication degree (40 credits). Instruction ranges
from project conception through image generation, presswork and bind-
ery, as well as web site design. Courses include photo/illustration and
page layout software, offset press operation, and print production. Local
printers are dissatisfied with the knowledge, expertise and expectations
of some students from SCTC and are beginning a discourse with the col-
lege to better align the curriculum with industry needs.

**Central Lakes College**, in nearby Staples, offers prepress courses in
graphic design.

The only metro area public college
to offer a degree in printing is
**Hennepin Technical College**
(HTC), which covers all three ar-
 eas of instruction. Some printers
have leveraged their relationship
with HTC to have access to their
students while in school and upon
graduation.

**Dunwoody College of Technology**, a private college less than 70 miles
from St. Cloud, offers a Graphics and Printing Technologies degree (79
credits). Coursework includes selections from five areas:

- Core Courses (Intro to Color Theory, Production Workflow, Quality
  Assurance)
- Image Transfer (Design for Print, Package Layout & Design, Job En-
  gineering)
- Press & Bindery (Advance Digital Press, Intro to Estimating, Princip-
  als of Flexography, Statistics, and Research, Resources & Informa-
  tion)
- Social/Behavioral Electives (Business Concepts & Practices, principals
  of Macroeconomics)

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<th>Hennepin Technical College</th>
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University of Wisconsin-Stout offers Graphic Communications Management in three program levels: undergraduate, graduate and a Bachelor of Science degree. Courses cover the entire process from design to delivery. St. Cloud printers’ have acted as partners with UW-Stout by accepting their students as interns as required by the curriculum. While the internships themselves are deemed valuable, the students do not come back to the St. Cloud area for work upon graduation. Printers’ feel they are training these students for their competitors.

The large employers in St. Cloud, Quebecor, Nahan, Merrill, and Banta, provide extensive in-house training to meet their expanding workforce needs. Other printers are able to reap the benefits of this training in the fluid movement of workers within this industry.

Training is also available in a less conventional manner. In April, 2003, the McKnight Foundation awarded $200,000 to the Stearns Benton Employment & Training Council to support costs associated with development of curriculum and training in the print industry. Quebecor was project champion and the key industry stakeholder involved in all areas of project design. The project was concluded in March, 2005.

A key goal of the project was to develop a pilot model of continuous training at Quebecor World in St. Cloud that is replicable within the printing industry locally, statewide, and nationally by partnering private industry with existing resources and institutions. A second key goal was to assist incumbent workers to develop a lifelong learning plan leading to increasing knowledge-based competencies for adapting to changing technological transfers and changing business conditions through a defined career ladder. To meet these goals, Quebecor built training modules with competencies for seven jobs (four in bindery, three in press). Two press simulators were procured for training, a web-feed simulator is housed at Quebecor, a paper-feed simulator is at SCTC.

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<th>UW Stout Graphic Communications Management</th>
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<td>- Customer Service &amp; Admin.</td>
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<td>- Publication Design</td>
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<td>- Typographic Design</td>
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<td>- Facilities Planning</td>
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<td><strong>Training &amp; Development</strong></td>
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<td>- Purchasing/Supply Chain Management</td>
<td>- Performance Analysis</td>
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<td>- Principles of Logistics</td>
<td>- Screen &amp; Specialty Print Manufacturing</td>
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CLUSTER MAP AND VALUE CHAIN

St. Cloud printers can be split roughly into one of two groups based on the number of employees, with 500 FTEs being the divider. Printers employing 500 or fewer generally serve the immediate local customer whereas those employing over 500 serve a global market. Interestingly, printers in both groups participate in the flexible manufacturing network.

A unique dynamic in this cluster is that because the smaller printers serve the local markets, they do not have to compete head on with the larger firms. Varying types of equipment, for example web- or sheet-fed presses, allow printers to specialize and expand their market. Product examples include magazines, books, specialty binding, manifold business forms, newspaper, directories, direct mail pieces and catalogs.

Our cluster map represents the common inputs and outputs, demonstrates the network connectivity, and shows the relative strength of local and global markets to both groups.

The following diagram represents the value chain of Sunray Printing Solutions. Sunray is a full-service, medium-sized printer. Of note in this diagram is the placement of customer service as a leading function of getting the sale, not as a lagging indicator of customer satisfaction.

How will the value chain evolve in the future? Looking
ahead 20 years or more, industry leaders project that customer service representatives will coordinate the prepress layout and operate the press through their desktop computers. Today, running the press is considered a craft that is mastered only through years of experience. The ability of the customer to be served at the point of call may someday redefine the skills required in the printing industry.

National data indicates most significant cost for a printer is employee compensation (wages and benefits) at 30.56 percent of total input. That’s nearly double the second highest cost, paper. In terms of a return on investment, continuous training for employees is money well invested.

Customer input/output percentages reflect the portion of costs these industries incur to make their product. National data show blankbook and looseleaf binder manufacturing have the highest proportional use of printing at nearly 13 percent.

In a knowledge-based economy, higher skills garner a higher wage. The chart reflects two dimensions of wages earned by print-industry employees.

- Wages and benefits in this sector are higher than industry averages.
- Growth in this sector workforce is driven by high-skilled workers rather than lower-skilled workers added to industries overall.

*Average wages paid nationally all industries and printing.*
GOVERNMENT ROLE

There are three costs that impact the viability of printers in St. Cloud and elsewhere. First, and at the federal level, when postal rates increase businesses scale back on mailing current and potential customers in favor of less costly means of contact.

Second, while the State of Minnesota allows capital equipment to be purchased tax free, the process is viewed as cumbersome. Currently, sales tax is paid at the point of purchase and recouped when proper forms are filed. The process is particularly burdensome to smaller, less sophisticated printers many of whom simply don’t request their rebate. Because these unclaimed collected funds roll into the general budget, there has been no urgency from the State to modify the collection or dispersion of these taxes. Legislators are being asked to make this particular tax an upfront exemption.

Third, healthcare costs threaten to limit benefits employers are able to provide their workers.

RECOMMENDATIONS

An ongoing concern for this cluster is the need for a well-trained workforce. Specifically, there is a need for press and bindery operators. This was described by one St. Cloud area printer as a lack of new workers who “want to get physical with ink.” In 2003, Quebecor World’s St. Cloud facility collaborated with the Stearns Benton Employment & Training Council in a McKnight Foundation grant project to provide career counseling and training for working parents in the print industry. The purpose was to develop a pilot model of continuous training that would be replicable within the printing industry locally.

As part of this project, money from the grant, Quebecor, and SCTC was used to purchase two press simulators, self-paced learning modules,
and instructor training. One of the outcomes was to have trained workers available to step into positions where there were critical worker shortages. Even though the project ended in 2005, Quebecor continues to utilize the web press simulator. The second simulator has been placed at SCTC so students can be trained in the skills needed to meet the personnel demands of the local printing cluster.

However, the project goal of trained printing industry workers for jobs that are in critical demand has not been achieved. Although the SCPA had been encouraged to access this resource, participation has not increased.

It is our recommendation that the SCPA, Quebecor and SCTC revisit the purpose of the Quebecor World Project to identify what implementation problems need to be solved so that peer incumbent workers can access the training.

The industry has identified a disconnect between what it needs and expects in an industry-educated new employee and what SCTC grads bring to the shop floor. Part of the challenge is that students self select to the prepress side of the printing industry even when the relative pay and job opportunities in production and finishing are more compelling.

It is our recommendation that the SCPA begins the conversation with SCTC president, vice president and faculty to determine the viability of courses in production/finishing, and align resources and strategies to grow enrollment. Further, we recommend this merged group address the feasibility of an internship curriculum that would put SCTC students on the shop floor as part of their coursework.

Enrollment trends in post-secondary courses are a reflection of the career choices considered by students during their K-12 years. Schools sometimes hold “career fairs” to introduce students to a broad range of possibilities. Likewise, businesses and manufacturers open their facilities to allow students and parents to tour. Both of these practices have not had ongoing participation due to perceived lack of initiative by either the
schools or printers. Gary Wilkes, director, Wright Technical Center (WTC) in nearby Buffalo, said mandated class time, limit of 85 minutes per class period with out the option of “borrowing” time from other classes, the limit of one trip per year, and bussing costs make student field trips unmanageable. However, he also expressed a willingness to re-connect with the SCPA even so far as to include an invitation for a printer to serve on the WTC business advisory committee.

It is our recommendation the SCPA initiates invitations to teachers, students, and their parents to tour its member facilities. Tours should include a hands-on component of production (for student participation) and information on wage and benefit opportunities (meaningful to parents). A specific effort should be made to reestablish the relationship with WTC. Relationships with secondary schools should include contact with SCTC to attract potential students to the St. Cloud area.

The St. Cloud WorkForce Center can assist the printing industry by listing job openings on the Minnesota Job Bank and by directing job seekers to openings in the printing industry. In addition, it can provide training scholarships to job seekers to enhance or gain the skills they’ll need to qualify for employment and help them develop a career path in the print industry.

Debra Bultnick is the Manufacturing Industry Liaison working to achieve the best results in workforce development for all disciplines of manufacturing industry, including the print industry, across Minnesota. She gathers and shares information with manufacturing associations, educators/trainers, and the State for the benefit of the workforce, the economy, and Minnesota’s manufacturing base.

We further recommend that the SCPA, as well as individual enterprises, establish and maintain an ongoing relationship with the St. Cloud WorkForce Center and communicate its specific workforce needs, and access the Manufacturing Industry Specialist, Debra Bultnick, for longer-term workforce development programs and resources.

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