

P/NL Publishers' Newsletter

**OPERATING IN A
COVID-19 WORLD**

MEET BRANDIE HERRELL

2020 GILLER PRIZE

FRIESENS COLLEGE

DIGITAL CONNECTIONS

CAPITAL PLANS UPDATES

FALL/WINTER 2020

Introduction – What’s Old Is New

Doug Symington, General Sales Manager

Fall is in full swing, which means our plants are busy and the number of new titles in the market is reaching its peak.

Despite the pandemic, books have once again proven their staying power; in fact, sales are up year-to-date over 2019. Publishers have once again shown their resilience in trying times.

(<https://www.publishersweekly.com/pw/by-topic/industry-news/financial-reporting/article/84748-trade-segment-sales-solid-through-september.html>)

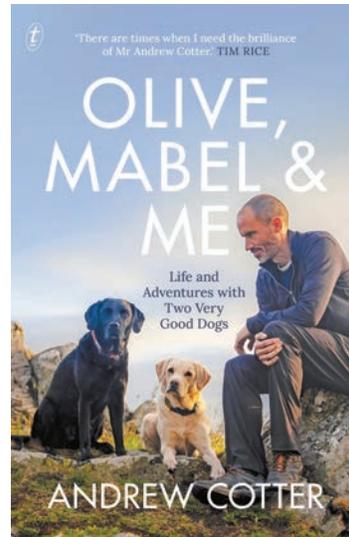
But books are not alone—other old “tech” is enjoying increased sales as well.

Boardgamesandpuzzlesareenjoyingasalesresurgence(<https://www.youtube.com/watch?reload=9&v=TU5QOK50f7U>), and Hasbro is reporting record sales of Monopoly as people look for ways to spend their time. <https://www.cnn.com/2020/10/26/business/hasbro-earnings-monopoly-sales/index.html>. I don’t know about your family, but Monopoly in my house is a contact sport.

Vinyl records have outsold CDs for the first time since the 1980s (<https://www.washingtontimes.com/news/2020/sep/11/vinyl-records-outsell-cds-for-first-time-since-198/>). So, it seems what’s old is new!

Books are unique in that they cover a wide range of topics and interests. This was driven home to me as I spent some time recuperating from surgery at home (nothing life-threatening). I have read more this year than ever before. During my recuperation period, reading was one of the few things I could do that took me away from the pandemic and the election news on TV. I read some great political books, such as *Fear and Rage* by Bob Woodward, and *The Soul of America* by Jon Meacham. I read the newest John Grisham novel, *A Time for Mercy*, which led me into the backlist to read *Sycamore Row*. A great read about Canada, *Lakeland* by Allan Casey, is a look at Canada and the role lakes play in our country’s culture and psyche. It is unique in that it talks about small lakes and not the Great Lakes, which have been written about extensively.

But one of my favourites is a book given to me as a gift to read while at home recovering, *Olive, Mabel and Me* by Andrew Cotter. Andrew Cotter is a sports broadcaster from Scotland, who, due to the pandemic, found many of his jobs drying up (the Masters, the Olympics, the Six Nations Cup), so he began commentating on videos of his dogs’ (Olive and Mabel) daily activities and posting them on his Twitter account (<https://twitter.com/mrandrewcotter>). To say it took off is an understatement. It exploded on social media, with fifty million views and climbing. The book chronicles



Cotter’s views on social media, and just his love of dogs. What started as social media turned into a book. If you like books and dogs, this is a must-read.

Reading has been a passion for me for a long time. For reasons I cannot remember, when I was in junior high (middle school in the US), I had to take a speed-reading course. The course was run in a lab where we

read text following a light moving down the page. The speed was increased and our comprehension was tested. Well that sounds delightful, and at the time I felt it was moronic. However, it has allowed me over the years to cover the printed word quickly. When I took the course, I never thought I would have a job that would take me into both publishing and printing.

Books offer us a great window into many worlds, all from the comfort of our own homes. I have a carving that hangs just outside our kitchen, given to us by my late father. I think it sums up many things very well, but it shows the key role books play in our family.



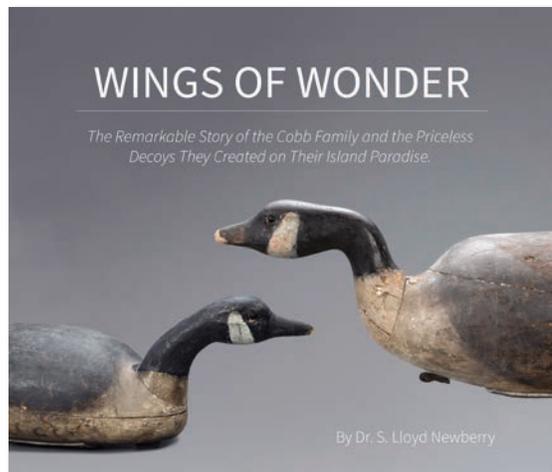
Have a great, successful, and safe holiday season.

Feature Books



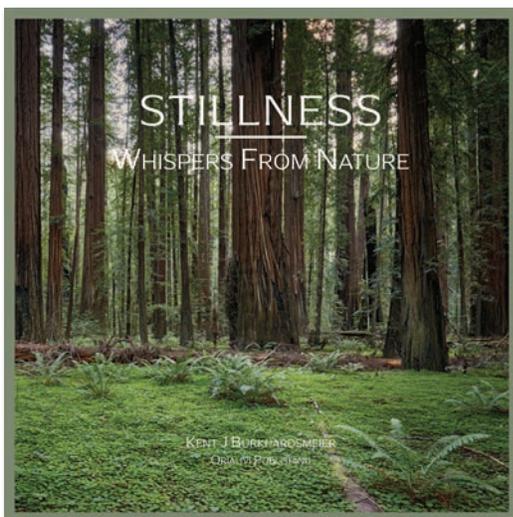
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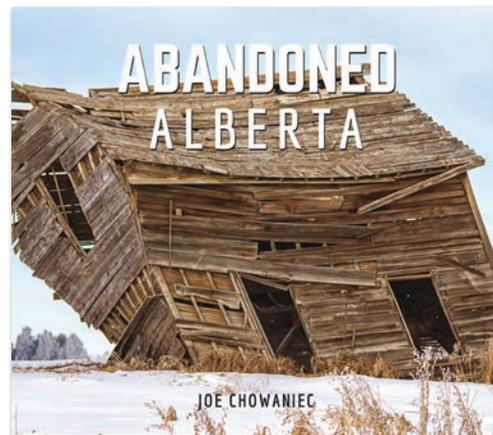
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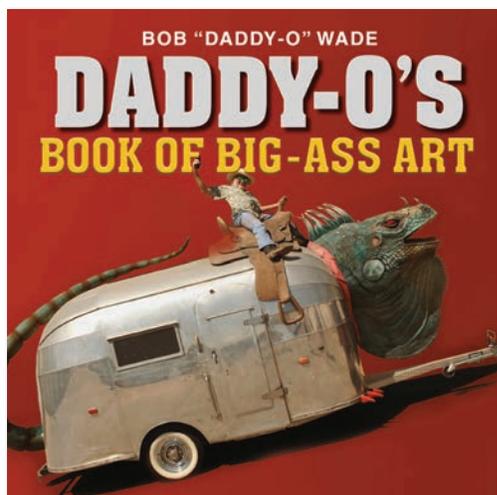
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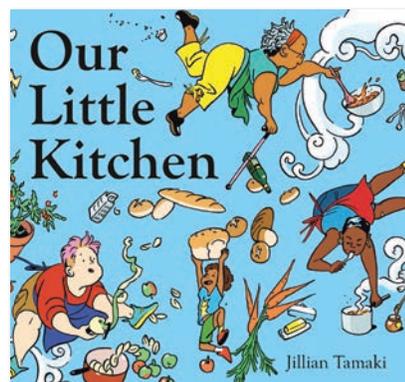
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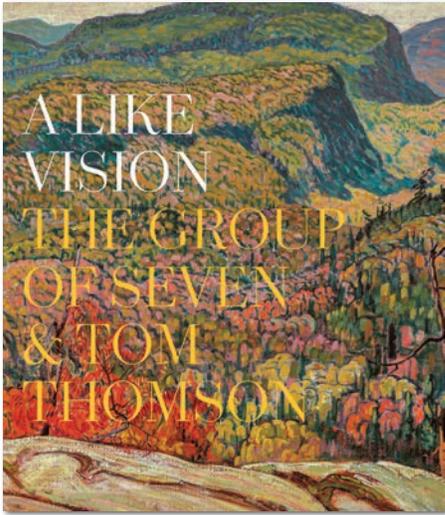
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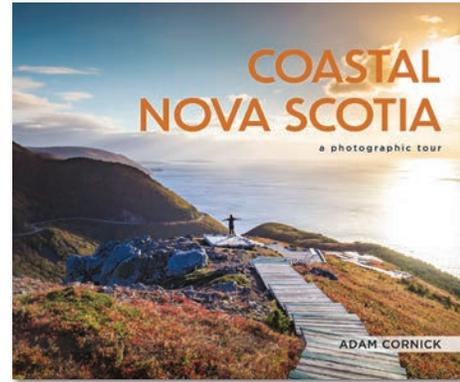
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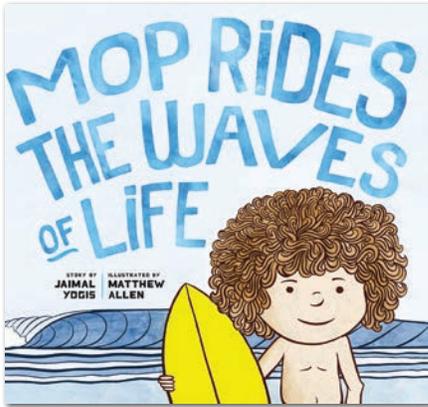
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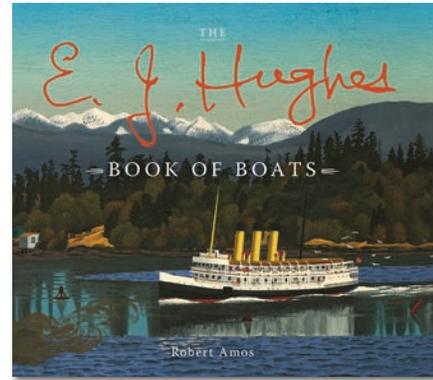
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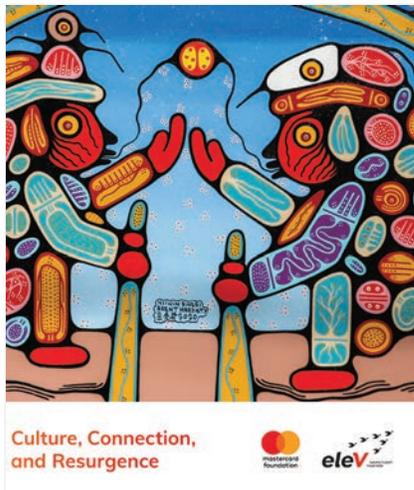
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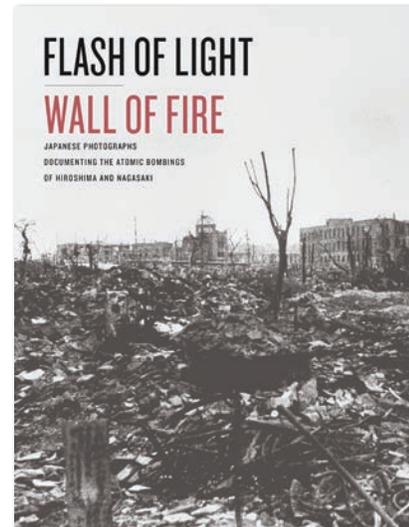
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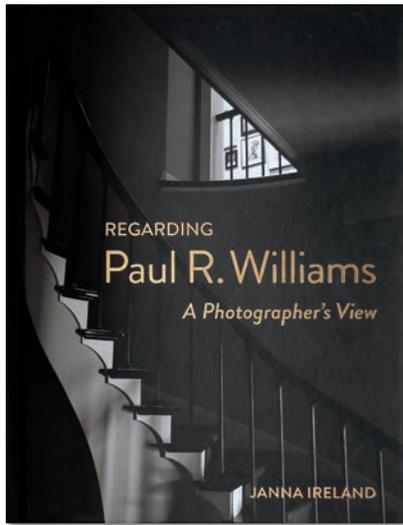
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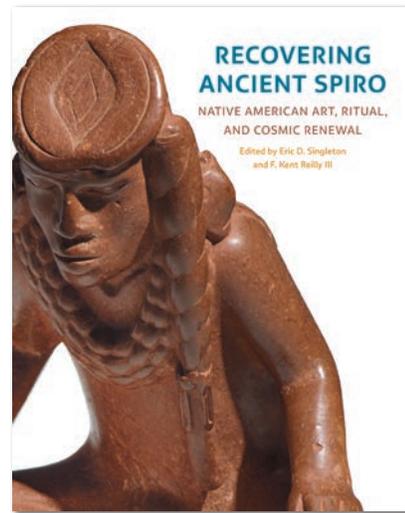
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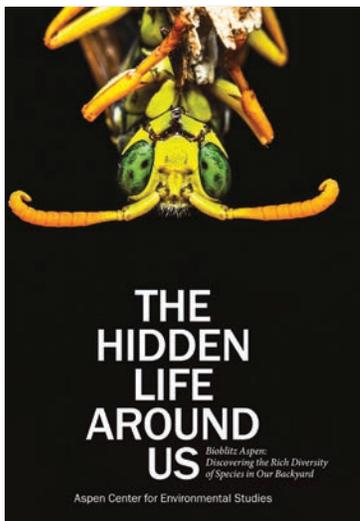
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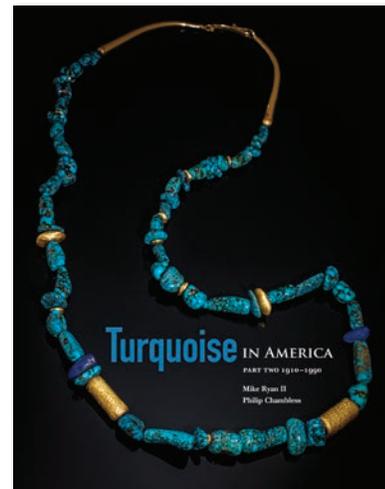
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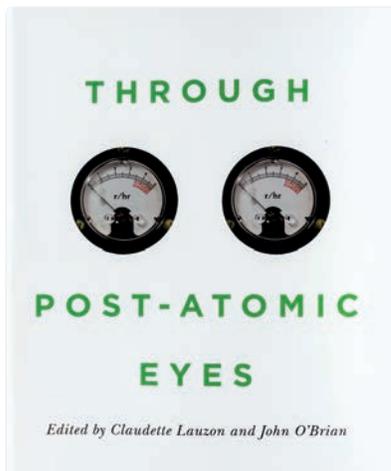
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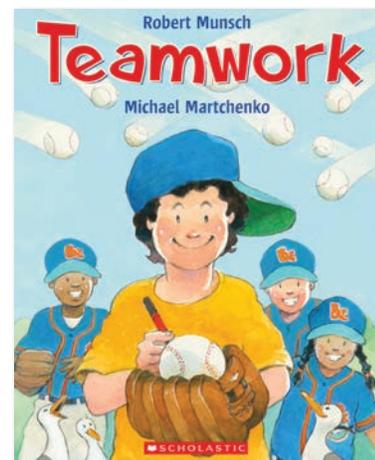
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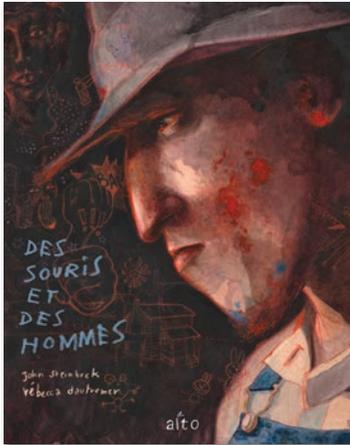
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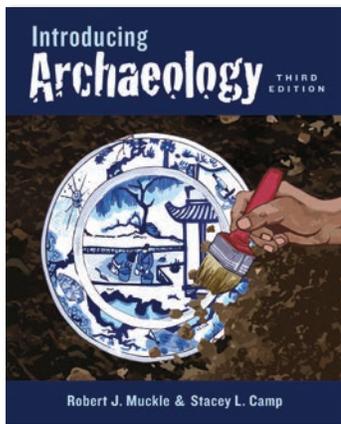
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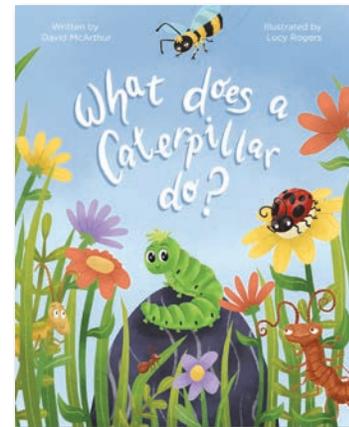
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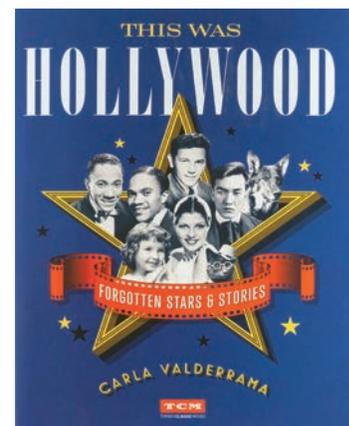
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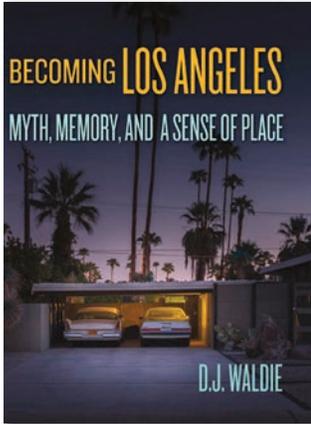
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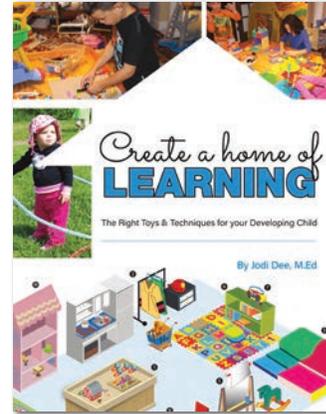
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Angel City Publishing

Trim Size/Pages
7 x 9 • 232



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Trim Size/Pages
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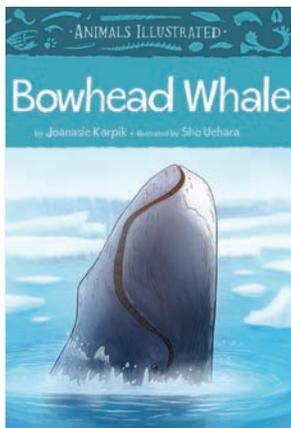
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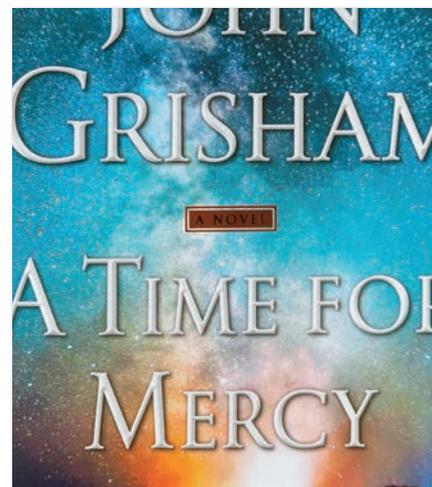
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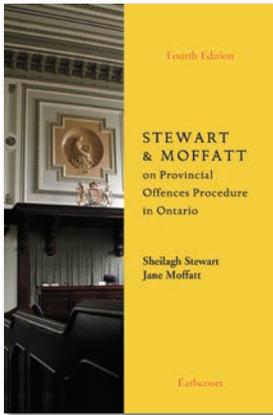
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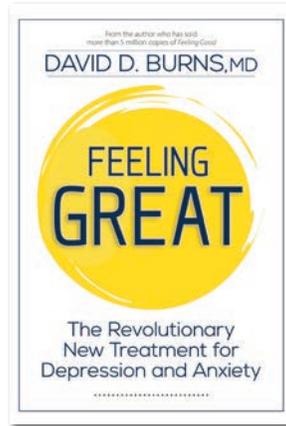


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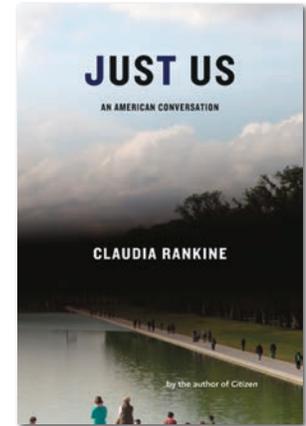
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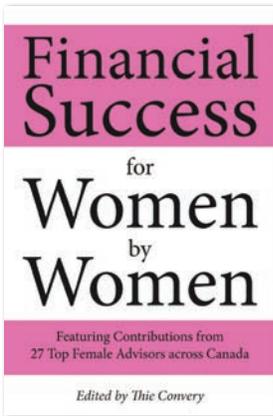
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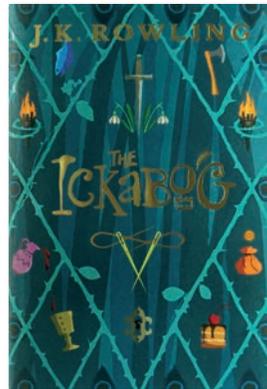
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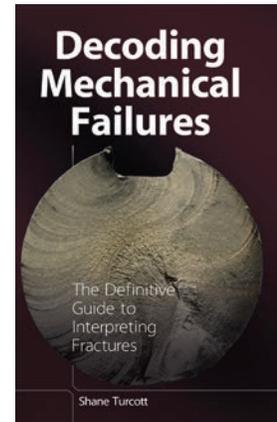
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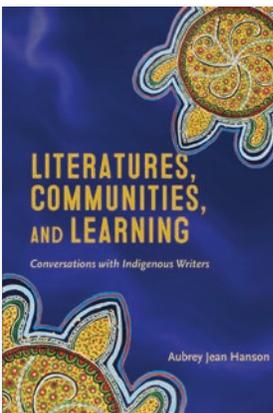
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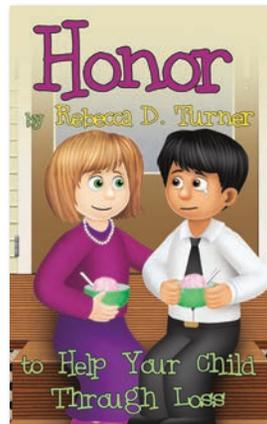
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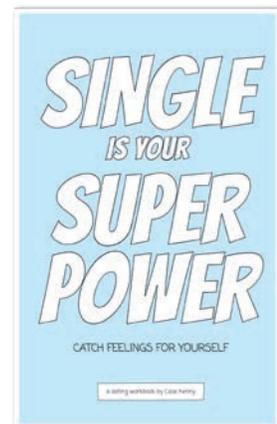
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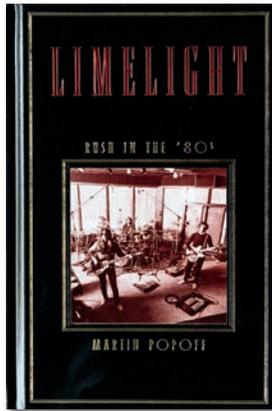
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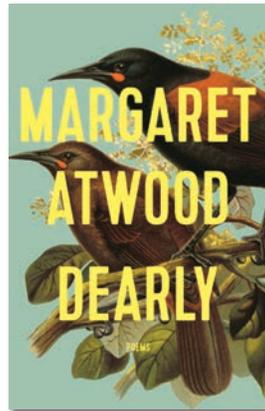
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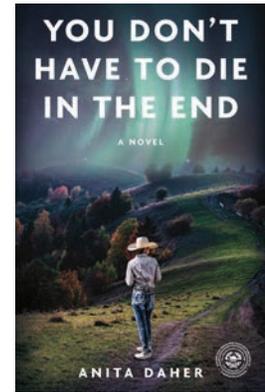
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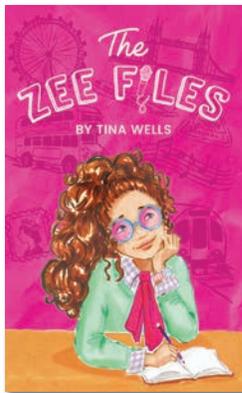
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Trim Size/Pages 5.75 x 8.75 • 344



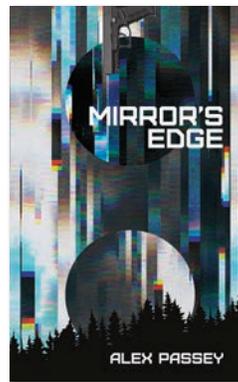
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Trim Size/Pages 5.625 x 8.75



Publisher Great Plains Publications
Trim Size/Pages 5.5 x 8.5 • 272



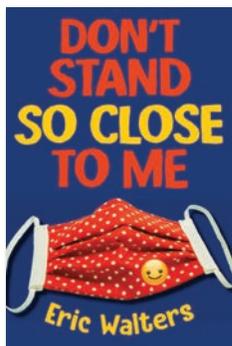
Publisher West Margin Press/Ingram
Trim Size/Pages 5.5 x 8.25 • 168



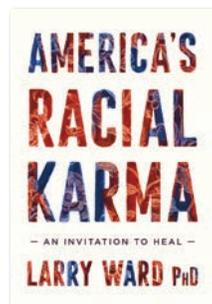
Publisher At Bay Press
Trim Size/Pages 5 x 8 • 360



Publisher Stonehouse Publishing
Trim Size/Pages 5 x 7.75 • 304



Publisher Orca Book Publishers Ltd
Trim Size/Pages 5 x 7.5 • 128



Publisher Parallax Press
Trim Size/Pages 4.5 x 6.4 • 144



Publisher Parallax Press
Trim Size/Pages 4.375 x 6.5 • 160

Operating in a COVID-19 World

Chad Friesen, CEO

We are now into month nine of the pandemic and the end is nowhere in sight. As I write this, positive cases are climbing rapidly in Manitoba and across North America. We have moved into a Code Red threat level in our region, resulting in mandatory masks, restrictions on group sizes, and occupancy limits for some businesses.



The impact of these increased measures on our business is small. We are operating at full capacity, but with significant emphasis on prevention measures. Our supply chains are reasonably stable, and the threat of a complete lockdown is low at this point.

However, like many businesses, we are still climbing out of what was a massive drop in orders this spring. Our revenue fell more than 30 percent for the months of April, May, and June, and we dipped into our reserves to avoid any layoffs.

However, this year has not been all doom and gloom. The markets for books and packaging have been strong thanks to at-home learning, at-home shopping, and US politics. Since midsummer, we have been fortunate to have strong order demand in most of our businesses, we have a team of employee-owners that have rallied together to battle through the pandemic, and we continue to invest in the business. Compared to many other companies in North America, we consider ourselves fortunate.

Corporate Goal—Mental Wellness

Before the pandemic, we rolled out a corporate goal of mental wellness for 2020. The plan was to select an overarching goal beyond our regular performance targets. The timing could not have been better to focus on mental health. As the restrictions increase, the negative impact on mental health only grows. Earlier this year, we introduced a new employee assistance program, mental health training for all employees, and several new resources for those struggling to cope. We're doing our part to help reduce the stigma and increase the conversations about mental health.

Ten-year Investment Strategy

For decades, Friesens has relentlessly invested in equipment and technology. The last three years have been large investment years as we focus on building scale and automation.

Like many manufacturers, we struggle with labour shortages in our local market. This has emphasized the need to build more automation into our processes so we can reduce low-

value and repetitive tasks. In 2020, the automation strategy saw the introduction of a new print-to-finish system, and several collaborative robots to help us prepare finished books for shipping. These new collaborative robots are built with smart safety technology, and they work side-by-side with our employee-owners.

Our long-term goal is to double the output of the company with the same number of employees we have today. This will make us less susceptible to local labour shortages, it will allow us to pay employees more, and it will expand capacity for our customers. It is a win-win-win strategy.

A Stable Partner

The pandemic has been hard on supply chains. Between forced lockdowns and companies simply failing under the economic pressure, we are keeping a close eye on our suppliers.

I want to assure you that Friesens remains in excellent financial shape. Our supply chains have felt pressure, but have held up well. We are fortunate to have built very good relationships with our vendors over years of consistent ordering and on-time payments. This reputation is incredibly important now, as it often provides us priority service versus other buyers that may not be as reliable.

You can continue to have faith in us as a key partner.

The Importance of Books

This year alone, we will produce more than 23,000,000 books, each sharing a story, an idea, or a perspective with the world. Your stories are more important now than ever and we're honoured to help share them with the world.

We wish you all the best through these uncertain times, and remind you that you have friends at Friesens. Thank you for placing your faith in us.

2020: Where Is the Finish Line?

Byron Loeppky, Senior VP of Books

The periodic appearance of snow in southern Manitoba is a reminder of what is to come. Despite knowing it is coming, the first big snowfall always seems to be a shock to the system. Given the year we are going through, maybe the shock will not be as big this year. As a company, we did not anticipate what has transpired when we planned for 2020. As a result, it has been a year where we have been forced to evaluate our business models, make the necessary adjustments, check our resilience, and power through new obstacles.

The book market in 2020 has been on a roller coaster ride as I know you are all too aware. A strong start to the year was slowed by Covid. The demand for books dropped during this time, but we also saw publishers trying to do two things. Firstly, establish work-at-home functionality for thousands of people as they moved them from their offices. Secondly, trying to determine what Covid will do to the book market,

and plan accordingly. There has also been a change in capacity in the book market, as some large US manufacturers are in bankruptcy, or are being sold. This is causing some uneasiness in the market.

I have attached the most recent results from Publishers Weekly, which we use to track trends in our industry.

TOTAL SALES OF PRINT BOOKS (in thousands)				
	SEPT. 7, 2019	SEPT. 5, 2020	CHGE WEEK	CHGE YTD
Total	12,641	14,848	17.5%	5.9%

UNIT SALES OF PRINT BOOKS BY CATEGORY (in thousands)				
	SEPT. 7, 2019	SEPT. 5, 2020	CHGE WEEK	CHGE YTD
Adult Nonfiction	5,559	6,026	8.4%	1.2%
Adult Fiction	2,544	2,798	10.0%	3.2%
Juvenile Nonfiction	1,055	1,524	44.4%	29.4%
Juvenile Fiction	2,821	3,684	30.6%	8.7%
Young Adult Fiction	391	562	43.4%	16.6%
Young Adult Nonfiction	50	68	34.7%	37.3%

UNIT SALES OF PRINT BOOKS BY FORMAT (in thousands)				
	SEPT. 7, 2019	SEPT. 5, 2020	CHGE WEEK	CHGE YTD
Hardcover	3,369	4,166	23.7%	5.3%
Trade Paperback	7,320	8,520	16.4%	8.1%
MassMarketPaperback	825	825	0%	-7.2%
Board Books	661	804	21.6%	4.6%

 SOURCE: NPD BOOKSCAN AND PUBLISHERS WEEKLY. NPD'S U.S. CONSUMER MARKET PANEL COVERS APPROXIMATELY 80% OF THE PRINT BOOK MARKET AND CONTINUES TO GROW.

The good news in the above chart is that total book sales are 6.9 percent ahead of last year, and both hardcover and softcover books lead the way.

We are three-quarters through the year, and it is a tale of two seasons for Friesens. Quarter one and quarter three were busy, and quarter two was slow. Quarter four looks to be very heavy, and we expect by year-end we will only be down 3 to 4 percent from a record 2019.

All areas of production have seen a drop in volume. From quoting activity and pages received, right through to books bound, the numbers are down. Delivery date moves are at about half of last year's numbers. However, the busy last six months of the year will allow us to get close to last year's record-setting numbers.

While times are more difficult now, we have followed through on our commitment to upgrade equipment in our facility. There are more details in the capital and building plan report elsewhere in this newsletter.

The Book Division team will be meeting on November 9 and 10 for our annual planning session. We continue to be excited about our industry and the future of books. This will be reflected in our topics. However, it is also an opportunity to look at how we do business, what our strategy is, and what adjustments we need to make, considering our changing world.

We are grateful for our many loyal customers. We know this has been a difficult time for the publishing industry, and I want to assure you that we have made both short-term and long-term decisions that speak to our belief in our business and our industry. We will be here for you in the years to come. We are making significant investments that will continue to make Friesens the leader in book manufacturing.

This year, worldwide changes due to COVID-19, and, more recently, the unrest in the US has changed how we see the world. Both situations have reminded us of the fragile nature of humanity, and how we are all interconnected.

We could not accomplish what we do without our wonderful staff, and we are very grateful for the fantastic team here at Friesens.

On behalf of all the employee-owners at Friesens, I pass along thanks for your partnership and for entrusting us with your work. We would not be in business without you. We wish you a very busy end to 2020, and an exciting start to 2021.

Garda Paper Name Change

Friesens and Garda Paper have had a long-standing and trusted partnership. Many of you are familiar with the name Garda and the characteristics of their paper. As such, we want to let you know about name changes made for their product lines stocked at Friesens:

- GardaMatt Art (previously Garda Silk)
- GardaGloss Art (previously Garda Gloss)

Rest assured, it remains the same product you have come to rely on not only for smoothness, thickness, and brilliance, but also for its versatility and printing excellence.

For more information, or if you have any questions, contact your Friesens sales representative.

Friesens College—Building Resources for Friesens Employee-owners

Dana Bergman, Staff Development Leader

Learning options continue to evolve, and many of us have been required to fill out online forms, participate in online workshops and training, attend meetings online, or even go through tutorials or videos that help us understand how to make a recipe.

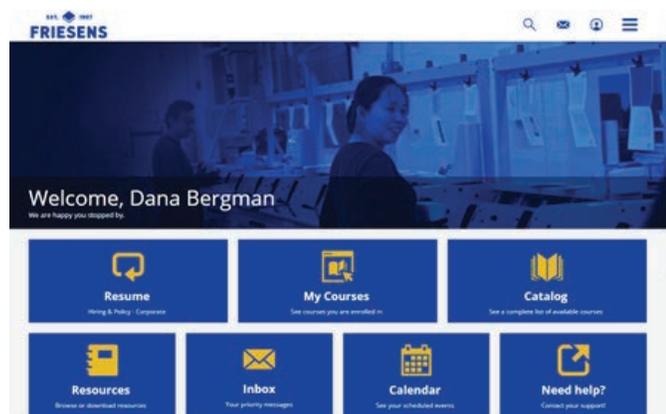
At Friesens, we have been exploring an online learning platform concept for several years, and in 2019 we introduced Friesens College—our own online learning management system. While we continue to create and build content, we are currently actively using the system.

The first deployment of Friesens College was in fall 2019 in response to the requirements for Accessibility—Customer Service Standard training. We did nine in-person workshops in the spring of 2019, then created an online version of the workshop to deploy to our remote sales staff throughout

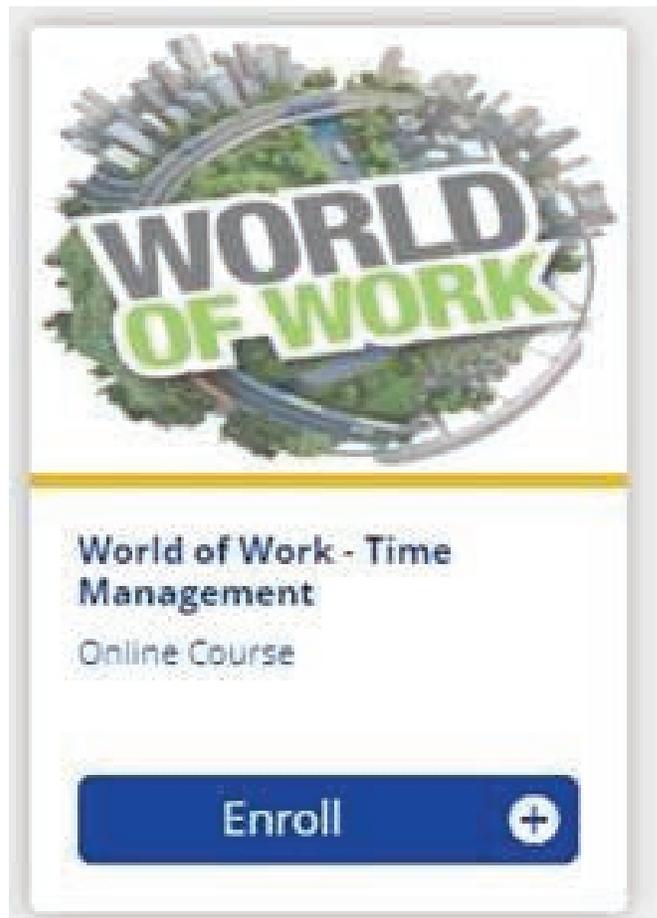
Canada and the US. The content was built so that, while the workshop was not interactive, it did require a confirmation of learning through a short eight-question quiz to verify knowledge gained. In December 2019, we launched our pre-employment orientation, and six weeks later we were advised that our system had been acquired by another system called Absorb. While this was unexpected and presented some hurdles to overcome, the new platform (Absorb) is easier to work with administratively and has a much better learner interface and learner experience. We were able to create custom branding, and with the help of Friesens Corporate Marketing, this is what the login/landing page looks like for our college.



Once you've logged into the site, your home page welcomes you!



The courses in Friesens College can be set up in different ways, and currently we have some courses that may be deployed only if they're assigned specifically, and some that are open to everyone who has access to the site. One of the newer offerings that was built this spring is a short thirty-minute online workshop on time management. This workshop has practical tips and tools to help (or remind) us about some of the things we can do to help manage ourselves and our time more effectively. When the catalogue is viewed in the college, the workshop looks like this (see next column), and is available to staff for self-enrollment.



As part of our ongoing efforts to provide access to relevant information to staff, the college will increasingly be a means of providing staff with timely, relevant, available resources that may be used to support learning.

The online college has the ability to include classes that require individuals to register personally, and are delivered in a live facilitated format. We continue to explore the many options available to us through the use of this online system.

This proved to be a timely acquisition for our learning environment at Friesens, as the onset of COVID-19 has required that we foster additional ways to communicate. We have been able to deploy pre-employment orientation for new staff through Friesens College, whether in-plant or remotely, along with other online options, and continue to work on a 2021 strategy for broader access to topical learning.

Additional online learning options were made available to staff through some education partners. Short workshops on soft skills and workplace dynamics have been offered through Workplace Education Manitoba, and we provided managers with a list of online options for specific learning, should we have downtime in production and want to support additional learning. Topical online learning options include continuous improvement, Friesens benefit programs, computer skills, health and safety, graphic arts, English language, and soft skills. We also offered a wide variety of titles for reading for

those who prefer to have books in their hands for learning. Throughout the past months, we have been very fortunate in that we did not need to send staff home, but were able to keep them gainfully working toward our company’s success, and thus we continue to engage in on-the-job learning, while practicing necessary safety protocols.

In summer 2020, we relocated our classroom in order that we might accommodate physical distancing to allow for continuation of Friesens’ English at work and essential skills classes, along with extended orientation and various workshops and individual online compliance training needs. We continue to support ongoing development of options to ensure that we support safe work and learning at Friesens.



Supporting ongoing learning and development during this time is an important part of looking toward the success of the future—ours and yours. As things change quickly, we will work to stay ahead of our own ongoing needs for development so that your products continue to be produced in the high-quality fashion you are accustomed to.

Canada Has the Absolute Coolest Set of Banknotes

Marg Macleod, Ontario Accounts Manager

We use them most days, yet there is so much we don’t appreciate about Canadian banknotes. Since we are in the business of print and we are all touched by print daily we thought you might appreciate these 10 interesting facts.

1. Canada is one of the few nations whose currency features women. The queen has appeared on Canadian currency since her coronation. Today, she still graces the twenty-dollar bill.
2. Other remarkable women to appear on Canadian banknotes include Agnes McPhail, Canada’s first female member of Parliament who was on the 150th Anniversary ten-dollar bill, and Viola Desmond, a civil rights activist and business woman, who is on our first vertical ten-dollar bill. On the reverse side of the vertical note is the Canadian Museum of Human Rights, which is located in downtown Winnipeg, Manitoba.



3. You can wash it, burn it, or try to tear it—the polymer based banknote makes it virtually indestructible.
4. During the current pandemic, a number of retailers have discovered that Canadian banknotes can be placed in a bucket of water and a small amount of bleach, and be sanitized and safe for use. Again, thanks to the use of polymer instead of paper.
5. Polymer banknotes last significantly longer than paper notes, thereby causing a decrease in environmental impact, and a reduced cost of production and replacement. There are approximately thirty-five countries worldwide who have made the switch to polymer banknotes.
6. Every Canadian banknote has a maple leaf to the left of the featured individual. You can shine a laser through this, and it shows the denomination.
7. There are countless security features on Canadian banknotes, which make the currency one of the most difficult in the world to counterfeit.
8. Canadian money is printed by a family-owned printing company in Ottawa, which opened their doors about ten years before Friesens (1897). They have been printing Canadian banknotes since 1935. Canadian Bank Note (CBN) also prints banknotes for a number of other countries worldwide, as well as passports, stamps, birth certificates, driver’s licenses, and countless other legal/secure documents. They are considered one of the most secure printing facilities in the world, and bring a number of customized security features to their products.
9. Canadian coins (nickels, dimes, quarters, fifty-cent pieces, loonies, and toonies) are all minted at the Canadian Mint, owned by the federal government.

10. And the very best feature of all: the Canadian one-hundred-dollar bill is said to smell like maple syrup.

Watch this YouTube vide for more: <https://youtu.be/rSDpYbhavp8>.

The Importance of Literacy

Tracy Robertson, Marketing Assistant/Copy Writer

How would you define literacy? Most people would say that it is the ability to read and write, and that would be true, according to a simple dictionary definition. But literacy is more about the substance behind learning the alphabet and forming sentences. It is a powerful tool, and when used effectively, it enables us to connect, interpret, and discern the intricacies of the world around us. According to the Government of Canada and Ministry of Education, their definition states

“Literacy is ... the ability to use language and images in rich and varied forms to read, write, listen, speak, view, represent, discuss, and think critically about ideas. Literacy enables us to share information and to interact with others. Literacy is an essential tool for personal growth and active participation as a contributing member of society. Literacy involves the capacity to:

- *access, manage, create, and evaluate information*
- *think imaginatively and analytically*
- *communicate thoughts and ideas effectively*
- *apply metacognitive knowledge and skills (in other words, being self-aware of one’s own thought processes)*
- *develop a sense of self-efficacy and an interest in life-long learning*

The development of literacy is a complex process that involves building on prior knowledge, culture, and experiences in order to instill new knowledge and deepen understanding.”

Today, many children are classified as “digital natives,” which means they are comfortable online as well as offline. Although the internet enables endless educational possibilities, the overwhelming array of content can be a hindrance to those children who cannot effectively sift through and interpret the material presented. Strong literacy skills are essential so that children can discern and interpret information in the best possible way. Parents and educators can encourage literacy development by:

- Sharing knowledge and explaining how to use literacy in everyday life
- Encouraging children to read and view a variety of texts such as newspapers, novels, comics, magazines, websites, email, and timetables
- Encouraging children to write and design for a variety of purposes using different mediums
- Discussing how texts look different depending on the purpose and audience—for example, text messaging uses different spelling than school projects

- Talking about reading material that is amusing, interesting, or useful
- Discussing favourite authors, producers, directors, or illustrators, and why they are favourites
- Discussing new and unusual words or phrases, and exploring these through print and electronic dictionaries
- Playing games that develop knowledge and enjoyment of words
- Making use of community resources for information such as local and school libraries

Friesens has always been a strong advocate in promoting the benefits of literacy and ensuring that we use every opportunity to instill the love of books and love of reading in every child. In keeping with these values, Friesens has been in partnership with First Book Canada and The Canadian Children’s Book Centre for a campaign that provided 130,000 books to children in need. The Canadian Children’s Book Centre donated the books, and Friesens covered the cost of freight and logistics to get them to their destination.

One of the greatest gifts we can give our children is the ability to read and form a love for the written word to help them increase their knowledge and understanding of the world around them.

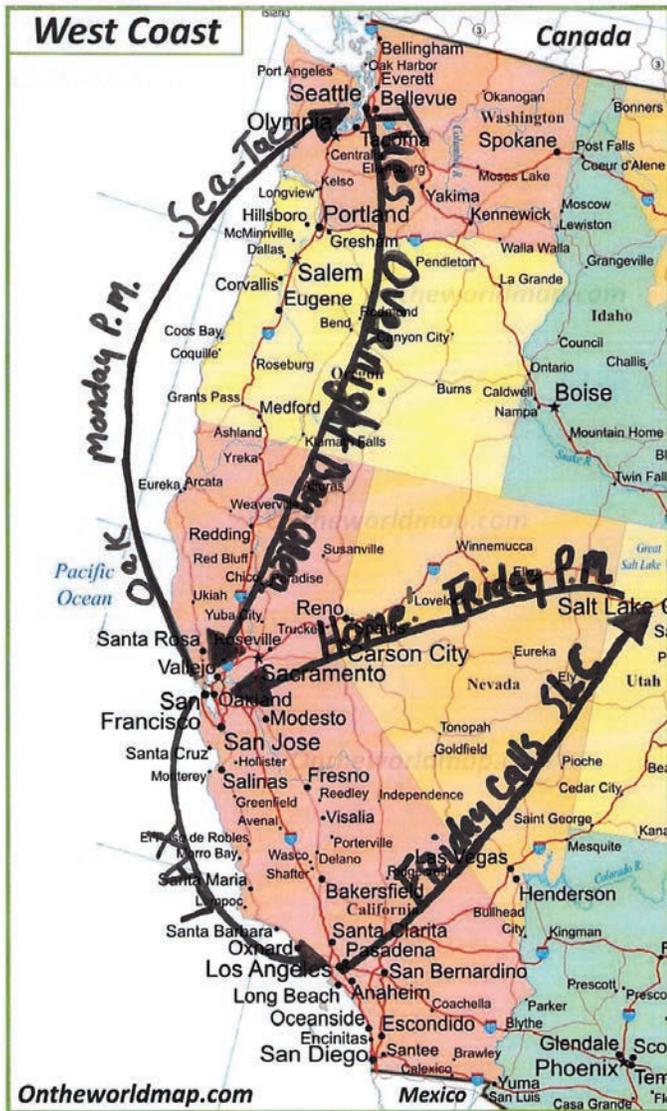
So, before you dismiss literacy as a rudimentary form of communication, such as learning the ABC’s of “reading and writing,” think about the bigger picture—one that involves an interchange of ideas on a global scale, enabling us to connect as a community in an ever-changing world through constant education and discovery.

PLACES WE SELL – Western United States

Duncan McCallum, Spectrum Books



Friesens has seventeen sales offices across Canada and the United States, from the Atlantic to the Pacific. Each of these territories is unique and interesting not only in the areas they cover, but also in the customers we serve and the different sales personalities that service them. In the western US, rather than take a cab or Uber around town to visit customers like you might do in New York city or Toronto, we have more geography to cover, and we usually fly to each city we visit, which can take a bit of time and planning.

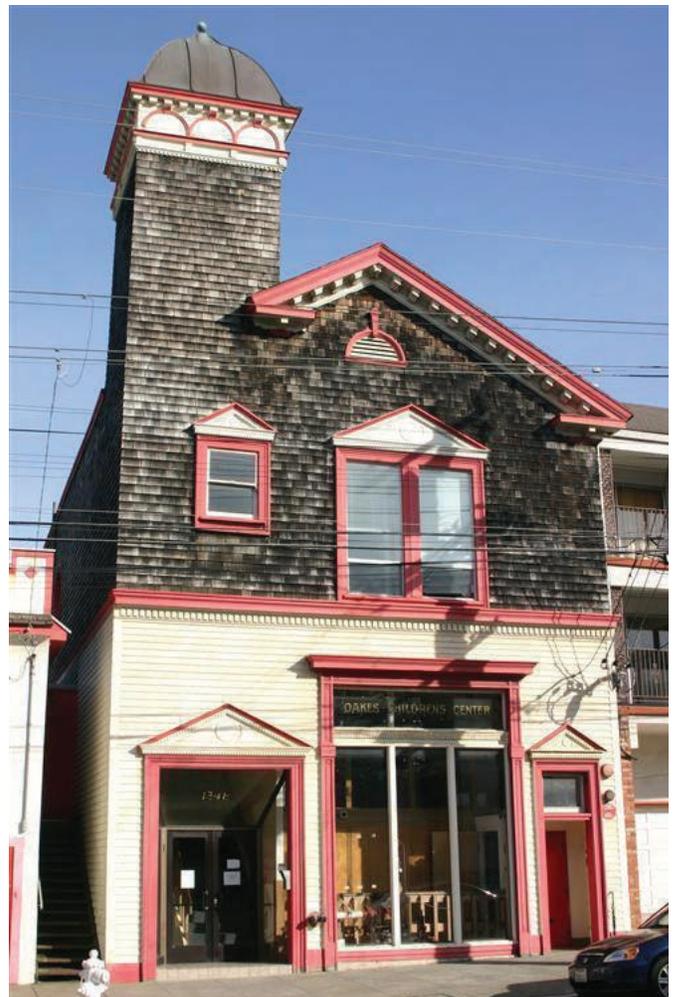


There was a time when customer service representatives from the plant visited our territory, and we'd call on as many customers as possible for the week that they were here. I did this a number of times with Cameron Fay, Tiffany Blanchard, Ralph Hamm, and, more recently, with Friesens' Sales Manager, Doug Symington. The map gives you an idea of how the week develops, often starting with meeting the plant representative in Seattle, then working our way down the coast, and eventually ending up in Salt Lake City on Friday to close the week. There were times when we'd reverse this pattern, or add Portland, depending on who was available for a visit and when.

What would we find in these various locations? Therein lies the true beauty of the sales game. Each regional area is varied and unique, and always interesting. In Seattle, there's a lot of publishing with regional themes, including Sasquatch Books (topics especially of interest to the Pacific Northwest), University of Washington Press (including co-pubs with Douglas & McIntyre), Mountaineers Books (mountain climbing), Wave Publishing (poetry, including a Nobel Prize

winning title printed by Friesens!), Becker and Mayer (trade books and packaging, a subsidiary of Chronicle Books), Compendium (gift books and journals), and the publishing arm of Amazon, to name a few.

San Francisco and the Bay Area include a wide range and diverse mix of publishers. City Lights is one of the oldest publishers in the Bay Area, and goes back to the Beat Generation of the early fifties and sixties, having published books by Lawrence Ferlinghetti. Here you will also find Chronicle Books (probably the largest trade book publisher on the west coast), Parallax Press (publisher for Thich Nhat Hanh), Berrett-Koehler, New World Library (exclusive publisher of the Joseph Campbell library), North Atlantic Books, McSweeney's, Callisto, UC Press, and many more. Ignatius Press is here as well, one of Friesens' long-time publishing partners serving the Catholic community. Ignatius has always been headquartered in interesting buildings, the most recent an old firehouse originally built in 1898 in San Francisco. I think it is accurate to say that the diversity of the Bay Area publishing community is indeed reflective of the culture and the people that live here.



Ignatius Press



The territory gained a bit (perhaps it's more accurate to say a lot!) more firepower eight years ago with the addition of Elise Gochberg. One of Elise's early tasks was to develop a foothold in the Los Angeles/San Diego corridor. And what a job she has done! Elise has established and grown relationships with many publishers in this area, including Angel City Press (publisher of beautiful LA history books), the

publishing arm of Patagonia, DeVorss Publications, Internet Brands (Fodor's Travel), Hay House, Plural Publishing, and many more. Elise's drive and ability to leave no stone unturned has been a boon for the territory.

I think it is safe to say that things have changed significantly in these past eight months not only for me personally, but also for how we operate as a sales staff. With COVID-19, sales meetings are mostly held over Zoom or Teams. Now it appears that the pandemic will extend well into 2021. And as I write this, we are four days off from one of the more contentious elections in US history.

In times of uncertainty, it is always helpful to look to those people and things that we are most grateful. For me, I am grateful for my faithful office assistant Lucy, for family and friends, for my faith, and for those that I have the pleasure to work with. This includes each and every one of the Friesens employee-owners for their hard work and dedication to beautiful books produced day in and day out. I am especially grateful for our customers, who provide us with such interesting projects, which allows us all the opportunity to be a part of, and to serve, a vibrant publishing community.

MEET BRANDIE HERRELL

Scott Sinnott, US Sales Manager



Please allow me to introduce our newest addition to the Friesens sales team, Brandie Herrell. She is our new sales rep for the southeast US, and is taking over for the incredible Margo Grace.

Brandie, originally from northern Kentucky, is thirty-nine years old and lives in Nashville, TN. She has been happily married for ten years, and her husband works in IT. They have four children: Mackenzie, twenty, a junior in college; Jayce, fifteen, a sophomore in high school; Nathan, twelve, in seventh grade; and Jackson, their four-year-old.

Their family also has two rescue dogs, a tiny Norwich terrier, and a big American pitbull.

Brandie has been involved in sales/marketing/advertising her whole life. Her career has been primarily predicated on high-end and high-volume catalog work with clients such as Fender Guitars, Winchester, LG, Gildan, and Browning. Her primary experience lies in soft-bound, perfect bound books, saddle stitched products, and marketing collateral.

Before joining the Friesens team, Brandie worked for a commercial printer in Nashville for five years. She is very excited to gain more knowledge about the publishing and printing world, while helping her new customers bring their books to life. She has always loved to read, and is excited to be a part of this industry.

FRIESENS FUN FACTS

Customers, tour groups, and those visiting Friesens are often interested in seeing the large equipment operate, and are fascinated by many of the facts and figures we share during their visit. As customer visits have ground to a halt, we want to bring Friesens to you and thought you might find these facts and figures interesting:

1. Number of quotes we create for customers per year = 16,500 (63.5 per working day)
2. Total tech support calls and emails per year = 10,315
3. Number of sheets (sometimes a sheet has two covers on it) we apply spot gloss UV per year = 1,820,000
4. Total number of impressions (one sheet running through the press) our sheetfed presses make per year = 74,500,000; this is the combined total from seven different sheetfed presses we run
5. Total number of impressions our web presses make per year = 86,500,000; this is the combined total from the two web presses we run
6. Total number of impressions our digital presses make per year = 21,600,000; we run two HP 7250 roll fed digital presses, and just purchased a new HP 50,000 press
7. Total pounds of paper we run through our sheetfed presses in a year = 16,760,000
8. Total pounds of paper we run through our web presses in a year = 11,285,000

NOTE: all paper waste throughout our production and offices is recycled

9. Number of truck shipments we send per year = 6,750
10. Number of courier shipments we send per year = 10,500

Paper Market Updates

Andrew Fennell, VP of Finance

The paper market seems to have stabilized for the time being in North America, with most of the mills now settled into a new supply and demand balance. However, some commentators suggest that there is high risk of significant mill and/or paper machine conversions to other grades, as well as further closures and curtailments as we head into 2021.

There are some bright spots, however, with packaging papers in a healthy state and book/publishing paper demand remaining fairly strong. But demand for newspaper and office paper continues to be very weak relative to historical demand and is not expected to recover to pre-2020 levels.

In Canada, there is some very positive news for the paper industry in Ontario:

Atlantic Packaging Products will construct a new 100 percent recycled paper machine in Whitby, Ontario. The new paper machine will be Atlantic's second recycled paper machine in Whitby and is being built adjacent to the company's current machine, which has been operational since the 1990s.

The new machine will be one of the most technologically advanced machines in North America, producing 400,000 metric tons per annum of high-performance lightweight medium and liner. Production is scheduled for the first quarter of 2022. Atlantic Packaging Products manufactures containerboard and corrugated packaging products.

Current Lead Times

- Coated (CFS) paper from the North American paper mills is readily available with normal lead times of four to seven weeks
- For uncoated (UFS) paper produced in North America, lead times are also normal: four to six weeks.
- Uncoated groundwood paper that Friesens purchases is available with normal lead times as well: four to six weeks

Transportation/Freight

One aspect of the supply chain that is somewhat invisible to some industry players is the transportation/freight sector. We rely heavily on carriers to deliver raw material to us (especially paper) and to deliver finished products to our customers on time. But as with virtually every industry, transportation companies have been significantly affected by the pandemic. Driver shortages are the primary concern at this time. As Quad Graphics reported recently, the National Load to Truck Ratio data shows 5.5 loads per available truck,

as increased shipments and shortage of capacity and drivers are causing increased freight costs and potential disruption. Thus far, we have not had significant issues (incoming or outgoing), but we will need to continue to monitor this aspect of the supply chain regularly.

Paper Pricing

Generally, paper prices are steady. There has been surprisingly very little volatility in pricing across the board over the last six months. There is some speculation that if uncoated mills restart machines (that were idled in 2020), and do so too quickly in early 2021, there may be downward pressure on prices. That remains to be seen, of course, and other factors including the cost of freight may counterbalance that effect.

COVID and Culture Shock Feel the Same To Your Brain – and Here's Why

By Peter Olson

A frustrating sense of 'molasses' clogging your thoughts. A fatigue you just can't seem to shake. Feeling 'tired' or 'worn-out' through normal days that simply don't feel as normal as they should. Every part of life seems to have changed, nearly overnight. Stores are different. Work is different. Interactions with friends and with strangers – it's all different. This scene is mirrors culture shock.

When someone moves to a completely new culture, many of the 'autopilots' your brain uses for thousands of small decisions every day become ineffective. In a similar way, your current environment has likely changed sufficiently enough that many of your own 'autopilots' are no longer working. When this happens, the next remaining option for your brain is to use a second decision-making process that requires far more effort and energy (glucose) to operate. Your body can only supply glucose to your brain at a certain rate – a rate far below what would be required to use this kind of thinking continually. Thus, additional thinking about routine matters has likely left you with a chronically depleted level of glucose in your brain. All to say: You are experiencing "culture shock."

What happens when the circumstances all around you are *different enough* from normal that your autopilots stop working? You know what to do for a red traffic light. But would your decision take longer if the same light turned blue? It is the effects of that kind of scenario – repeatedly, hundreds of times a day, for months – that is the structural cause for culture shock. And – I would argue – the structural cause for much of the mental fatigue we are all facing right now.

Parts of life seem to be changing monthly, if not weekly, if not daily this year. All this change has upturned enough of the normalcy that some amount of our mental "autopilots" are currently not working. Example: Imaging walking down the street, thinking to yourself what a wonderful day it is when suddenly you run into an old friend! Instantly, you move

from recognizing your friend to greeting them. Handshake. Hug. Wave. You don't notice deciding what to do...because that's how fast thinking works. Automatic. Effortless. "But wait!" you say. "This is not how it works anymore!" COVID. Last year greeting a friend didn't require us to use the limited capacity of slow thinking. But now it may. With many of our autopilots disabled, we are facing a world where we are being forced to think in ways we are not accustomed to. And it's draining your brain of capacity you used to have for other things.

Some Advice:

1. **Eliminate Options.** When faced with the limits of your mental capacity, it can be helpful to realize you cannot deliberately make a choice about everything – you will run out of capacity. It can be very powerful to use some of your limited capacity deciding what you will not decide about. Have you ever heard those stories of Silicon Valley execs who have perhaps twenty of the same shirt – and nothing else – in their closet? This is what they are doing. Those execs decided shirt choices are simply not worth spending thought on.
2. **Routine is your friend.** All of us have lost a massive amount of the familiar in our lives. Routines which effectively accomplished parts of our lives (at minimal thinking cost) have vanished. Those 'autopilot' decisions are gone, so do what you can to get some of it back. Create routines – even imperfect ones – to win back some thinking capacity. Decide how you will do x, y or z and then refuse to continue rethinking it. For now.
3. **Reduce input.** We need to recognize our brain may need a break. Your mental capacity is not unlimited, and it's probably a wise investment to use some of that capacity deciding what you are willing (and able) to spend it on. More may not be better if you cannot process it – don't overextend.
4. **Talk.** Externalizing what you are experiencing is key. If you don't have someone to talk it through with, journal. You are not alone, strange, crazy, or losing it.

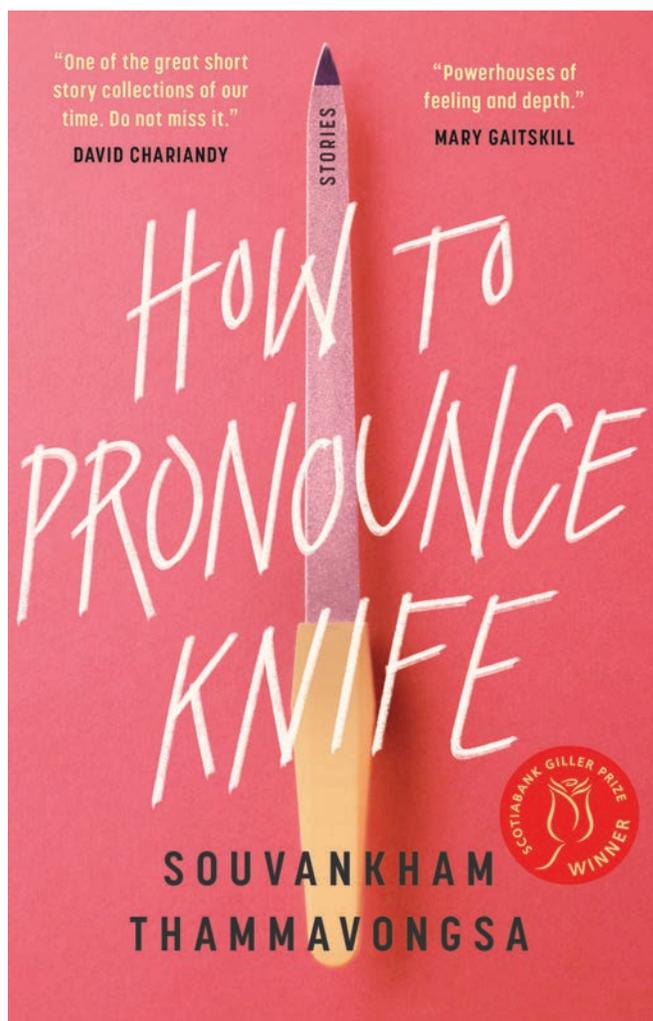
And the 2020 Giller Prize goes to ...

The annual Giller Prize is an award recognizing excellence in Canadian fiction. It has been around since 1994 and was founded by Jack Rabinovitch in honour of his late wife, literary journalist Doris Giller. It has become one of the premier Canadian literary prizes, and in part responsible for the continued growth of Canadian literary talent. Some of the past winners such as Alice Munro, Margaret Atwood, Michael Ondaatje, and Mordecai Richler have received this prize and other honours from around the world.

We would like to congratulate the finalists for this year:

- *Ridgerunner* by Gil Adamson, published by House of Anansi Press
- *Here the Dark* by David Bergen, published by Biblioasis
- *Polar Vortex* by Shani Mootoo, published by Book*hug Press
- *The Glass Hotel* by Emily St. John Mandel, published by HarperCollins
- *How to Pronounce Knife* by Souvankham Thammovongsa, published by McLelland & Stewart (imprint of Penguin Random House Canada)

And the winner goes to ... *How to Pronounce Knife*.



Our heartfelt congratulations to Souvankham Thammovongsa and entire team at Penguin Random House Canada. We were fortunate to have been the printer of choice for this title, which includes a mad rush of books that are required when a book wins this prestigious award.

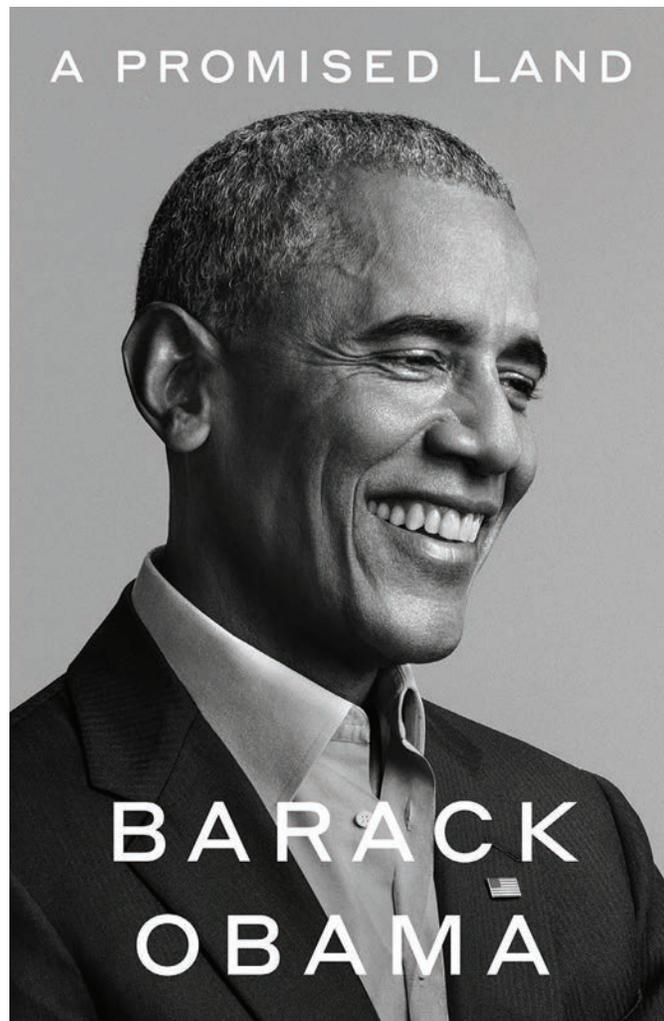
If you are looking for some great Canadian literature to give as gifts or read for yourself over the Holiday's here is a wonderful list to choose from. Happy reading everyone.

***A Promised Land*, by President Barack Obama**

Crown Publishing

Doug Symington, General Sales Manager

Friesens was one of a few printers chosen to play a role in the initial printing of this long-anticipated memoir of America's 44th president.



The initial run was 3.5 million copies, and Friesens was awarded a significant part of that run. Of course, with a book of this nature, there is a fair bit of security surrounding it. Our employee-owners are committed to the security of all our customers' intellectual property; where it really differs on a book like this is the treatment of waste—from plates to paper—and the security of the loads leaving from the shipping docks. All those processes are tightened up a little more than normal.

The reality for publishers that have a potential best seller like *A Promised Land* is they would like to have all the press time they need. The reality for us is we have to try to balance all our customers' needs and still recognize that for both Friesens and the publisher these titles can mean the difference between a good year and a great year.

We are fortunate that Penguin Random House US and Canada are both fair and long-term partners. Each year, they work with us to come up with a mutually agreed upon allocation of titles that we can plan for and still meet the needs of other customers. It is not a perfect science, but we do our best to create a reasonable balance.

Since July of this year, press and binding time has been in high demand. This is due to strong book sales, some instability in the manufacturing space, COVID-19 impact, just to name a few. COVID-19 has created a double challenge. First, we have to do all we can to keep our staff and community well; and second, it has been more challenging to get technicians in to work on and install equipment. This has all served to make balancing the load even more challenging than normal. Our staff has stepped up and the plants have been running 24/7 for most of the last two quarters.

We thank all our customers for the work they award us, whether it be a blockbuster like *A Promised Land*, or a smaller title. It all combines to keep our equipment running and employee-owners working.

Progress on Capital Plans and Building Plans for 2020

Byron Loeppky

This is the last of three years planned for significant capital upgrades.

The outside of the expansion is now complete, including two additional truck bays (picture below).



Our first perfect binder from Muller Martini (pictured below) was sitting in crates for months before we were able to begin installation, and it is now installed.



However, we continue to wait for technicians to install the waste extraction system (pictured below) that is required for the perfect binder to function. The installation will begin on November 2 and the training on the perfect binder will begin the week of November 16.

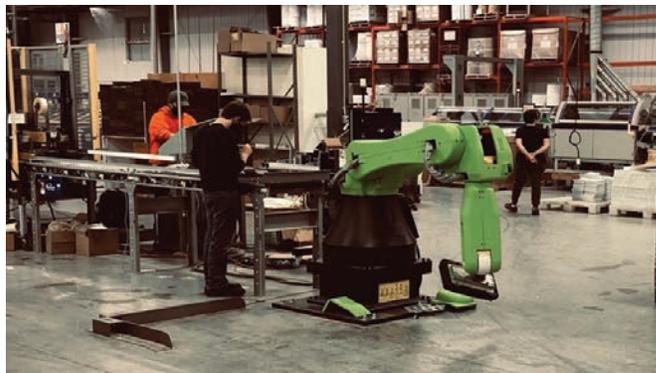


On the north side of the expansion, you can see from the pictures below that our cover decorating equipment has been moved into place, including a second Gietz foil stamping machine. What made this move even more impressive was that it was done without the help of outside technicians. Our internal maintenance team looked after all the moves, and should be congratulated for not only getting them moved, but also for getting them operational on schedule, with minimal interruption to our customers.



Three additional cobots are actively being installed, and should be operational by the week of November 9. This is to complement the first one that was installed in the first quarter of 2020. When Covid hit, it delayed the installation of the remaining cobots until now. Its green colour indicates

that it is safe to work alongside humans. Any human touch to the machine while running will shut it down.



The old cover decorating room is now roll storage for our sheetfed presses (picture below).



A lot has happened over the last number of years. What is left to be done?

- Move a plate setter from our finishing facility to our printing facility. It will be relocated in mid to late November.
- Move both MGI machines (our UV finishing equipment) to our finishing facility to be in close proximity to our cover decorating equipment in late 2020 or early 2021.

While our capital list will be shorter in 2021 than in the past three years, it will still involve some significant purchases that we will share with you in our next Publishers' Newsletter. Stay tuned.

As you can see, there is a lot of activity on the capital and building front. I hope you find this exciting, as we do. A lot has been accomplished, but there is still some work left to do before we can take a breath. The challenge with all these moves has been to try to accomplish them in a way that does not interfere with our ability to keep producing and shipping product to our customers. This has required tremendous teamwork throughout the company. We are very grateful for the cooperation of staff and customers alike as we continue our efforts to make Friesens the premier book manufacturing facility.

KUDOS

Title: Alex Trebek Book

Hi Doug, Marc, and Glenda,

I just got my sample copy of the Alex Trebek book, and it looks fantastic! Thank you so much for all your hard work on this title, and for accommodating our challenging schedule. We really appreciate it.

Thanks!

Allison Har-zvi

Production Manager

Simon & Schuster

This was a challenging project for sure so I am so happy to hear the books look so good.

Thanks everyone for all the hardwork!

Lisa Erwin, Simon & Schuster

Title: Okanagan Strong

Hi to all of you, I cannot thank you and all your staff for the excellent job you did on my book! It is perfect. The colors are bang on and the craftsmanship superb. I am just sorry we could not come out to see all of your familiar and smiling faces. All the best to you and your fine company. My compliments to the pressman.

Respectfully Mike and Shelley Biden

Title: County Heirlooms Cookbook

Hi Rob and Aron,

The books arrived and they are gorgeous! They turned out even better than I'd imagined. Thank you so much.

We've gotten nothing but compliments, and the bookstore here in Picton is already working on a big window focused on the book. It's beautiful!

Thanks,

Leigh Nash

Publisher / Invisible Publishing

Title: Asylum

Hi Glenda,

I received my copy of Asylum. It is beautiful.

Many thanks,

Peggy Samedi, Penguin, USA

Title: Greenwood

Bound books look fab!

Uma Subramanian, PRH Canada

Title: Our Hearts Are As One Fire

Hi Ian,

The books look great, you can go ahead and release the shipments.

This was a super challenging little book from a production standpoint so it's nice to see it turn out so well. I love the finished cover!

All the best,

Michelle van der Merwe, UBC Press

Title: Lauzon – Post-Atomic Eyes

Hi Ralph,

I've received the advance copies and they look stunning. Thank you and your team for producing such a beautiful book.

Also, I would like to thank Dominic for his guidance of this project through all the stages of production.

Elena Goranescu, McGill-Queen's University Press

Title: What Does A Caterpillar Do

I wanted to let you know that I received the copies of my book today and it looks simply stunning!

Thank you all so much for your help in making this a reality and I can't wait to see how they sell through Orca!

Thank you again,

David McArthur

Title: Piercy ON THE WAY OUT, TURN OFF THE LIGHT

I received my sample copy today (amazing)! It looks beautiful!! Thank you so very much for all your help with this title, especially with all of the issues with the component delivery!

It has been a real pleasure working with you on our first (but certainly not last) project =)

Best,

Marisa Nicole, Penguin Random House LLC

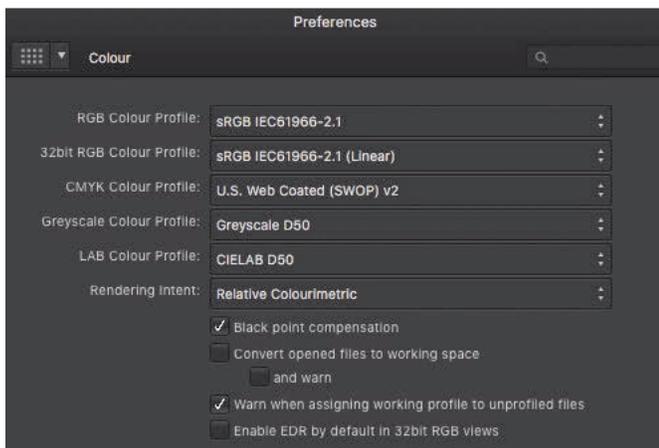
by Brad Schmidt

AFFINITY SOFTWARE SUITE

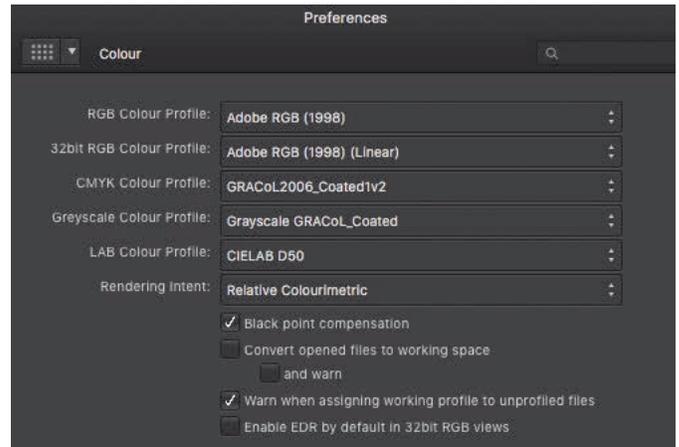


The Affinity software suite has been a slow but steadily developing story in the publishing industry that I have been watching since the introduction of Affinity Designer. It is great to have a full compliment of tools for page design, photo manipulation and illustration. These tools are only valuable within our environment if they can be printed. Here we explore the settings within the program to configure the colour management settings and also review the PDF export options to prepare files for good results when printing at Friesens.

One of the first checks I perform is determining what are the default colour settings for the Affinity product line. Not surprising the default set of ICC profiles for the program are in line with other programs in the industry. The default RGB profile for the Affinity software suite is sRGB IEC61966-2.1 and the default CMYK profile is U.S. Web Coated (SWOP) v2. Grayscale profiles are set to Greyscale D50. For Friesens these settings are not the best representation of how our presses are configured.



• Affinity default colour settings



• Friesens recommended colour settings in Affinity

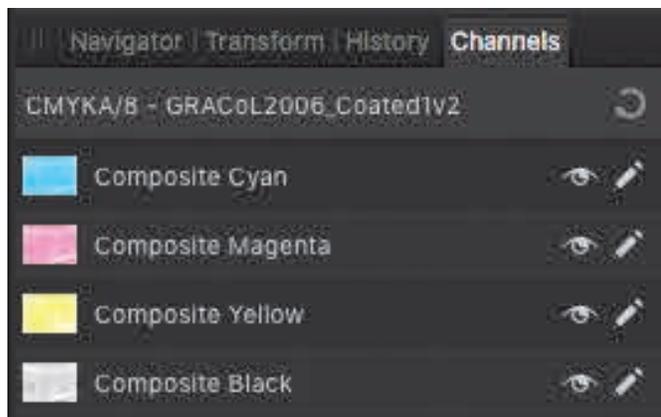
To update the colour management settings for Friesens, ensure that GRACoL profiles from the Friesens website are available on your computer. These profiles can be downloaded at the following address in the Colour Management section of the web page.

<https://www.friesens.com/books/services/preparing-your-files/>

To modify the colour settings, go to the Affinity Photo Preferences. Next, select the Colour option. Here is where the default ICC profiles for the program are set. To modify the settings to be aligned with Friesens base settings, set the RGB Colour Profile to Adobe RGB (1998). Change the CMYK Colour Profile to GRACoL2006_Coated1v2. Then set the Greyscale Colour Profile to Grayscale GRACoL_Coated. At this point I realize that it would be really convenient to have a settings preset that would make it simpler to change the settings as a group but I did not see an option for this. Now open Designer and Publisher and repeat these changes to the colour settings. This will ensure that all three programs are using the same settings.

Another challenge when working with profiles is determining the profile that is active when working with images. When viewing an image in Affinity Photo it is not readily apparent which profile is active. It is important to know as the profile can affect how the image displays. It is possible to determine the current embedded profile using the menu Document, Convert Format / ICC

Profile... but navigating to this menu repeatedly is tedious. A much more convenient option is to use the Channels palette where the active ICC profile is constantly displayed. Now at a glance you can see the current ICC profile used and determine if a profile conversion is needed.



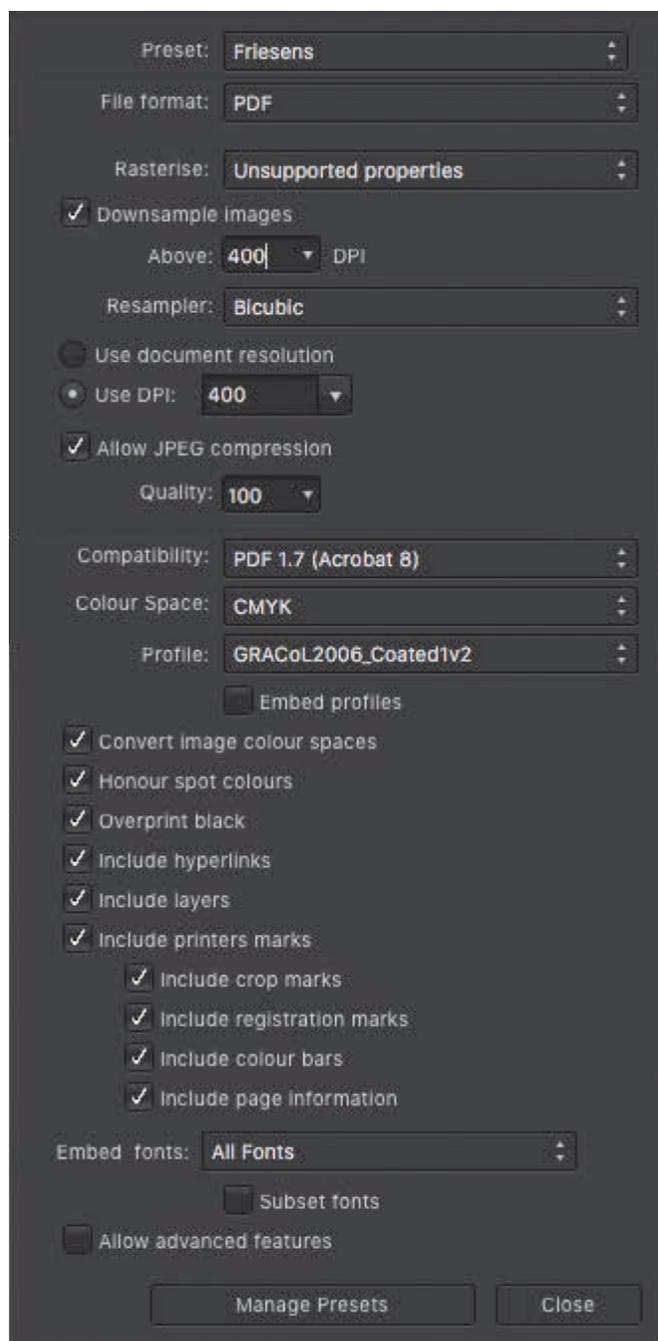
• Affinity Photo active ICC profile

When working with Affinity Publisher there are a few settings that are important to get right to ensure that PDF files can be exported successfully for print. When creating a new document, set the Colour Profile to match the Colour Settings. For documents coming to Friesens, I recommend selecting the GRACoL2006_Coated1v2 profile. Another is for documents that have bleeds. If the bleed option was not selected when the Publisher document was created the bleeds option will not be available when exporting to PDF. This is only a small hurdle to overcome as the bleeds can be reinstated by specifying the bleed amounts in the Document Setup... dialog box. I recommend setting the bleed amount to 0.125 inches which will show up as a grey box slightly larger than the page.

In our prepress department we have been able to identify a few projects that have been supplied to Friesens that were created using Affinity Publisher. From this experience we have identified a few areas of the PDF export settings that can cause output failures if not set correctly.

The PDF export settings have an option to Subset fonts. The resulting PDF only includes the characters used in the Publisher document. We have found that this option causes the PDF to fail when processing in our system. With the Subset fonts option unchecked the PDF processed successfully.

Another setting to watch for the Embed profiles option. Make sure this option is unchecked as having this setting on will cause all text and images to be tagged with ICC profiles. I have seen this cause problems where 100% black text is converted to CMYK causing undesirable print results.



• Our recommended PDF export settings for Affinity Publisher

Refer to the above settings for the PDF export settings I recommend using with Affinity Publisher.

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