



CENTRAL Upstate Mfg.

WINTER / SPRING 2016

Leadership

3 CNY women who are taking a strong position in manufacturing.

COMPANY PROFILE

The Fulton Companies

Pulaski, NY is headquarters for an American multinational.

Diversity Pays

Banish unintentional bias to achieve a competitive edge.

Advocacy Update

Resource Guide



The Women-in-Manufacturing ROUNDTABLE

An off-the-cuff discussion about the benefits and challenges facing women in manufacturing, and what can be done to attract more women to the field.

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INSIDE THE WINTER/SPRING 2016 ISSUE OF

CENTRAL Upstate Mfg.

5 | From the President's Desk

Sharing knowledge, experience and insight.

7 | MACNY Sets a Pro-Business Agenda

Each year we turn to our members in the manufacturing community to determine what areas we should specifically focus on.

9 | Diversity and Inclusion Strategies... and Unintentional Bias

It's not enough to make our organizations more diverse...we need to pay attention to inclusion and insist on full engagement for all employees.

11 | Why the PEB Sector Model Works

A workforce strategy specific to each of the sectors leads to significant results.

14 | Innovation Wins Fulton a Place in the Global Marketplace

Investment in research and development and a proactive approach to shifting markets has made Fulton a leader in heat technologies for more than 60 years.

17 | Welcoming Women to Manufacturing

What causes the gender gap, what are some of the barriers keeping women out of manufacturing, and how can we begin to address the situation?

20 | Utilizing the Potential of Women in Manufacturing

Profiles of three women leading manufacturing in CNY who are at the top of their game.

25 | The Women in Manufacturing Roundtable

Examining the root problems and potential solutions to closing the gender gap in manufacturing.

30 | More Renewable Energy for New York

Can the state meet its goals in the next 15 years?

32 | Advances in Additive Manufacturing

The promise of 3D printing is close to realization.

35 | Resource Guide

A listing of governmental and agency contacts.

50 | Advertisers Index



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Welcome

I thank you for your support of MACNY and manufacturing. Our success comes through building great relationships with you, our membership.



Manufacturing is the growth engine for Central and Upstate New York. Since 1913, MACNY has been proudly helping the individuals and companies within this vital sector to be more successful. Our member companies have stories that not only can be shared, but **SHOULD** be shared. This is why we decided to start the magazine: to allow our members to share their knowledge, experiences and insights into how they have sustained and grown their businesses for decades and, in some cases, for centuries.

Our Inaugural Issue profiled four leaders from three of our region's most widely recognized and acclaimed manufacturers: Aminy Audi of Stickley, Audi & Co., James Beckman of Crucible Industries, and Lou & Mark Steigerwald of Cathedral Candle. They provided insights into their companies and how they have remained in business for over a century and continue to thrive.

In this issue we will continue our focus on leadership in manufacturing. We offer insights from three female leaders in manufacturing - Kathleen Alaimo, President of Syracuse Label & Surround Printing; Anita Dungey, President of Auburn Leathercrafters; and Tina Hess, Co-Founder of Corso's Cookies and The Decorated Cookie Co. Each brings a meaningful approach to the sort of leadership that has guided their companies to success.

Also in this issue are insights from a range of women in manufacturing about how the manufacturing community can encourage and grow the number of women in the industry and ensure that they have every opportunity to contribute as leaders.

As we did in the last issue, we offer articles contributed by the experts on our staff here at MACNY. Each article focuses on specific areas of interest to the manufacturing community.

Finally, I thank you for your support of MACNY and manufacturing. Our success comes through building great relationships with you, our membership. We cannot thank you enough for your continued support over 103 years of serving the region's manufacturing community with programs, services, and offerings. We truly hope you enjoy this newest benefit of MACNY membership as much as we have enjoyed creating it.

Sincerely,

A handwritten signature in black ink that reads "Randy Wolken". The signature is fluid and cursive, with the first name "Randy" being more prominent than the last name "Wolken".

Randy Wolken, President and CEO

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MACNY Sets a Pro-Business Agenda

We like to describe our advocacy efforts as “gentle pressure, relentlessly applied.” By continuing to educate Albany about the issues and proposing real, plausible ways that we can begin to remedy these problems, it is our hope that the business climate will continue to see improvement, and that businesses and manufacturing can continue to grow and prosper in our great State of New York.

Anyone who closely follows government understands that the second week of January sets the stage for the New York State legislative session, as this is when the Governor publicly releases an outline of his budget proposal. In prior months, the Administration is busy crafting its policy areas of focus, crunching numbers and preparing for what, essentially, is the beginning of the negotiation process. The Senate and Assembly use this proposal as a starting point for a review of their own initiatives and priorities.

As part of this process, businesses and special interest groups are doing the very same thing. We all have more than enough issues we would like to see addressed and, in a perfect world, we could address them all. However, this is not the case, which is why each year we turn to our members to determine what areas we should specifically focus on.

Only then can we sit down with our coalition partners and friends, such as other business interest groups, to divide and conquer. We arrange to take the lead on various issues and let others take the lead on other matters while we provide support. Together, we are able to achieve as much as possible in the course of the budget process and throughout the remainder of the legislative session.

On Tap for MACNY in 2016

The items touched on below represent some of the more pressing issues our membership has indicated are in need of our attention and advocacy.

Business Tax Cuts: Every year, MACNY sends a survey to its members to determine what state and federal issues are of particular importance for their businesses to remain competitive with other domestic and international businesses. Year after year, survey results have indicated that the Upstate tax burden is a top priority for our members. The effect of high taxes is two-fold: businesses located in Central New York are forced to compensate for dramatically higher taxes and outside manufacturers are discouraged from relocating to our state. One measure that would be impactful is adoption of business tax reductions for small manufacturers and businesses organized as pass-through entities, including Sub-S corporations, LLCs and partnerships.

Workers Compensation: The manufacturers of New York, as employers, consistently find that

the high cost of workers compensation insurance is unbearable. Also, we are hard-pressed to find many manufacturers prepared to agree that the system in place serves injured workers well.

This session, we will be seeking some specific changes on the benefit side. Additionally, we will propose finalizing and implementing administrative updates to medical guidelines on scheduled loss-of-use awards; mandating the use of panel providers for the first 90 days of medical treatment; and reform of the indexing of maximum benefits to reflect regional average weekly wages.

Energy Tax Reductions: With the majority of our membership comprised of energy intensive industrial manufacturers, many of our advocacy efforts revolve around lowering the costs of energy for the statewide manufacturing community. What is most troubling is that, currently, it is not the cost of the electricity or energy itself that is the challenge; it is the taxes that are associated with and tacked on to our energy bills.

MACNY will be proposing cutting the remaining funds owed as part of the 18-A energy assessments. These taxes—with \$180M still due to the government—are a burden on energy intensive businesses. Relieving manufacturers and businesses of that burden will allow them to invest those dollars elsewhere, to the betterment of their business, their employees, and the business community at large.

Workforce Development Legislation: To remain globally competitive, it is critical we provide our sector with the tools needed to shape and support a highly skilled workforce. Historically, our legislative branches have been unable to adopt policies strong enough to support the workforce needs of our state. We will recommend establishing dialogue on the creation of a registered apprenticeship program, in which a small or medium sized company would be able to work jointly with MACNY and other companies in designing a program that would meet their collective needs, without unduly draining money and resources. This plan would enable more companies to participate in apprenticeships, put more employees on the road to better jobs, and build the overall skill base of New York's workforce, while fostering collaborative training of secondary, post-secondary, and adult learners.

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Diversity and Inclusion Strategies... and Unintentional Bias



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If diversity is the mix, inclusion is making the mix work. It's not enough to make our organizations more diverse... we need to pay attention to inclusion and insist on full engagement for all employees.

Diversity provides a competitive advantage. Many studies have proven that diverse organizations are more profitable and that diversity contributes to competitiveness and innovation. Yet many organizations, particularly in manufacturing and the tech sector, continue to struggle with diversity and inclusion, especially in the area of attracting diverse job candidates.

If diversity is the mix, inclusion is making the mix work. It's not enough to make our organizations more diverse, to garner the benefits of a diverse workplace we need to pay attention to inclusion and insist on full engagement for all employees.

Hard-Wire Diversity and Inclusion into Business Strategy

Many Fortune 500 companies have actually hard-wired diversity into their business strategies, directly impacting their bottom-line by taking shifting demographics into account and being responsive in the products and services they offer. Years ago Bank of America recognized the impact of changing U.S.

demographics and, as a result, grew their Hispanic checking and savings account business by 67%, with more than \$15 billion dollars in bank deposits.

One of the most telling stories to clearly demonstrate the need to tie business strategy to diversity was highlighted in *The Inclusion Paradox*, by Andres Tapia. The scenario was titled, "A Hospital Built for White People." Because of rapid expansion in a major metro area, primarily driven by a huge influx of a racially diverse population, a major hospital chain was building a new hospital. Fortunately, before the final blueprints were approved, a key stakeholder asked the group if they knew how diversity might impact their services.

One salient fact that came to light was that if a patient were white there would typically be one or two people in the waiting room to see him. If the patient were African American there would be six or seven, and if the patient was Latino, there might be over a dozen visitors. The hospital revised the plans to meet its patients' needs.

Look for Unintentional Bias in your Processes

Maybe there is more we can do to ensure that we are considering all the best available candidates and explore whether any current practices are influenced by unintentional bias.

Malcolm Gladwell, in his best-selling book, *Blink*, highlighted the remarkable ways all of us reach decisions very quickly. In many cases, with very little information, we are able to make accurate predictions. He referred to this as "thin slicing." He also pointed out the real dangers of thin slicing, including unintentional bias. All of us unwittingly suffer from this. Fortunately, much light is being shed on this topic and unintentional bias can actually be measured by taking the Implicit Association Test created at Harvard University. You can take the test yourself at www.implicit.harvard.edu.

Hire and Promote the Most Qualified People

Google is taking a very interesting approach to making people decisions, one meant to ensure that they are not unintentionally excluding the best talent

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Google looked at the little things that sent subtle messages. They discovered, for example, that all but one conference room was named after a man.

from consideration. They are attempting to rule out unintentional bias by examining and changing their processes.

Since Google is a data-driven company, all measures to achieve improvements in staffing and performance are based on hard data tied directly to the realities of job performance. The self-evaluation at Google was implemented to answer the question, "Are we making the best possible people decisions?" It was prompted by a study on bias in hiring reported in *The New York Times*. The research included sending resumés that were identical except for the applicant's name—some had male names and some had female names—to professors at top universities to see if gender bias exists in hiring decisions. The results showed that not only were the male-named resumés chosen more often, the supposed male applicants were viewed as more competent and they would, on average, be paid more.

Similar research was conducted at MIT to see if there was racial bias. The identical resumés in this study bore two names, one more Caucasian sounding (Emily) and one seemingly African American (Lakisha). The study sought to answer the question, "Is Emily more employable than Lakisha?" The results showed there was bias, and Emily was viewed as more employable than Lakisha.

Google's process included collecting data, looking at their structure of success, evaluating subtle messages and, ultimately, holding everyone accountable.

First, Google's researchers took a comprehensive look at job performance and determined those factors that correlated with high performance. They did this by examining all top performers in each job category and zeroing in on those attributes that were essential for success. Then they removed all data that was not directly correlated to performance. They stripped all resumés of names, addresses, year graduated, and even the schools attended, items which, based on the data, had no impact on performance.

Then Google created structured job interviews to ensure that all candidates were asked the same questions and that the questions could be directly tied to competencies required for the positions. There were even examples of what great answers looked like versus good or poor answers. Google also required all managers to take the Harvard Implicit Association Test and to speak up when they saw bias. Google's position is that unless people see themselves as part of the problem they can't see themselves as part of the solution.

Google looked at the little things that sent subtle messages. They discovered, for example, that all but one conference room was named after a man. They examined their promotion practices. Employees could be nominated for promotion in two ways, by their managers or through self-nomination. It quickly became clear that almost all self-nominations were from men. Google fixed this with just one company-wide email from a senior executive explaining the process and encouraging all employees to self-nominate.

The Google strategies are worth further exploration. You can learn about the entire process Google went through by watching the presentation on *Unconscious Bias* from Dr. Brian Welle, Director of People Analytics, available on YouTube. I'd strongly recommend it to any organization that wants to better measure and improve performance, and to eliminate bias.



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The sectors are organized to build capacity to improve the pathways to jobs and to increase the number of companies committed to participating and serving as “career sparks” for students and teachers .

Why the PEB Sector Model Works

When the Regional Economic Development Council (REDC) established a plan for the economic growth of the Central New York region, it defined a set of Growth Sectors as part of the strategy to accomplish that goal. A key element, consistently found in each sector, is the need to develop a workforce strategy specific to each of the sectors. The skills shortage is a national issue and each region of the country is working on a solution.

In response to this approach, Partners for Education & Business (PEB) re-aligned its own strategy for impacting the workforce pipeline by creating several business-led sectors, including Technology, Advanced Manufacturing, and Financial & Professional Services, in which to concentrate its activities.

The sectors are organized to build capacity to improve the pathways to jobs. The goals of the sector strategy are to increase the number of companies that are both committed to and participating in serving as “career sparks” for students and teachers and also to increase the number of students that are impacted by PEB/PEB-partner programs. This article focuses on

the successes achieved in the CNY Technology Sector, led by SRC, Inc. under the direction of Lisa Mondello, Director of Corporate Communications.

Champions Make Good Leaders

SRC, Inc. is the Champion of the CNY Technology Sector, engaging with other local businesses to raise awareness of STEM careers and to ensure the technology-workforce pipeline remains filled with local talent. Lisa and her team have also mentored other companies, encouraging them to join SRC in various activities to increase STEM educational opportunities. These efforts have led to several programs being developed across the region that will grow the future workforce in Central New York. In her role as the chairperson, Mondello has brought nearly 20 local companies together in an effort to encourage students to come back to Central New York to live and work. As a result, the CNY Technology Sector is very active in delivering a wide range of activities to increase awareness of careers in manufacturing and technology.

Joint Accountability Ensures Goals and Results

The CNY Technology Sector group identified four key areas to work on:

- **The CNY STEM Scholars Program** supports local high school students pursuing a degree in a STEM field by providing them with opportunities to receive an annual scholarship for a maximum of four years along with a guaranteed internship with the sponsoring company. Several scholarships are awarded each year to graduating seniors and up to three awards are focused on minority and female applicants to help increase their participation in STEM careers.


After the successful launch of SRC’s program in 2013, C&S Companies, a local engineering, architecture, planning, environmental, and construction services firm, offered its own scholarship in 2014. This year, the program will expand again, as Carrier Corporation offers scholarships as well.


- **The CNY STEM Scholars Connection.** The Sector has found innovative ways to capitalize on the scholarships and spin off new ideas and



GLOBAL REACH LOCAL ROOTS

Founded in 1949, The Fulton Companies is a multi-national group of companies headquartered in Pulaski, New York. From humble beginnings in an Oswego County garage, Fulton has grown to include ten manufacturing facilities across three continents. Fulton manufactures complex industrial and commercial heat transfer equipment all around the world, but our commitment to Central New York remains strong. With a recent multi-million dollar facility expansion in Pulaski, Fulton continues to grow and hire locally.



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The CNYSTEM.com website serves as a one-stop-shop for information on STEM careers for students, parents, educators, and other businesses. The website is in partnership with the CNY STEM Hub.

programs. For example, to serve the more than 400 students applying for a CNY STEM Scholarship—who share an interest in STEM careers—the Sector developed the CNY STEM Scholars Connection. The “Connection” allows us to stay in touch with these students by offering two annual networking events with companies in the CNY Technology Sector. The program now includes an internship component that connects these promising students to tech sector companies seeking interns.

- **The CNYSTEM.com website** serves as a one-stop-shop for information on STEM careers for students, parents, educators, and other businesses. Registration for many of the programs can be completed on the website.

- **The STEM Career Exploration Series** is an exciting program for high school students, connecting them with local employers to learn more about the variety of careers in STEM industries available in Central New York. In 2014, this program provided five sessions on different STEM careers with three local companies and a career expo where students could meet with local companies who were looking to hire people with two-year degrees. The events averaged about 70 student attendees each and many parents stayed for the programs as well. The 2015/2016 series will once again highlight several companies that offer careers in STEM, including C&S Companies, Bristol-Myers Squibb, King + King Architects, United Radio, Anoplate, National Grid, ICS, Haun Welding Supply, and SRC, Inc.

More information can be found at www.cnystem.com.

PEB Serves as a 3rd Party Administrator

PEB stepped up to serve as administrator of the CNY Technology Sector. PEB’s role includes convening the meetings, helping to set goals, organizing events, implementing activities, coordinating participation, and reporting out on results. PEB is supported by sponsorships and contributions from the companies in the CNY Technology Sector.

The CNY Technology Sector has been at the forefront of helping to shape the vision for STEM education in our region to ensure the technology workforce pipeline remains filled with local talent. Without the Sector’s combined efforts, the various programs mentioned above would not have gotten off the ground, let alone grown at the rate they have.

For more information or to join the CNY Technology Sector, contact Joe Vargo at joev@macny.org or 315-448-1012.

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The Fulton Companies, headquartered in Pulaski, NY, is a multinational group with more than 1,000 people working at facilities in four countries. Fulton has been a leader in emerging heat technologies for more than 60 years.

Innovation Wins Fulton a Place in the Global Marketplace

Working out of the garage of his Fulton, New York home, Lewis Palm invented the world's first vertical tubeless boiler and, in 1949, founded Fulton Boiler Works to market it. In short order, his steam boiler design became the most popular choice for laundry and dry cleaning applications across North America. Within just a few years, Fulton Boiler Works housed 70 employees at its new headquarters in Oswego, NY, where more than 2,000

boilers a year were produced using manufacturing techniques that would seem primitive today.

Over the decades since, Fulton Boiler Works has remained a family-owned company dedicated to innovation while expanding its product offerings and geographic footprint. In the 1960s, Fulton opened its first manufacturing facility in Bristol, England (Fulton Ltd.); a new 43,000 square foot Bristol-based headquarters was brought online in 2013.

In the early 1970s, Ronald Palm, Lewis' son, took up the family tradition of innovation. Ronald developed a thermal fluid heater that provided high temperature heat transfer fluid at low system operating pressures. The technology which led to the formation of Fulton Thermal Corporation in 1974 was initially targeted at industrial laundries but was quickly adapted for process applications. Fulton Heating Solutions was formed in 1989; and the first of Fulton's Asian manufacturing facilities was founded in Hangzhou, China in 1995 (Fulton China). Today, these groups comprise The Fulton Companies, which boasts more than 1,000 employees serving all areas of the globe, with its worldwide headquarters located in Pulaski, NY.

As a global provider of innovative heat transfer solutions, Fulton offers a wide array of products, including steam and hot water boilers,



Lewis Palm with his vertical tubeless boiler.



CONTINUOUS GROWTH: In 2012, a \$13 million expansion, above, brought Fulton's total square footage in Pulaski, NY, to more than 250,000 square feet.

In 2013, the UK operation moved to its new £3.5 million, 43,000 sq. ft. Bristol-based headquarters.

thermal fluid heaters, and myriad types of ancillary equipment. As demand for creative solutions to complex heat transfer applications has grown, Fulton has excelled in the design and fabrication of customized system solutions and is now recognized as an industry leader in engineering and design support and in aftermarket services.

Over the past decade, Fulton has been the beneficiary of a growing global marketplace. Advances in technologies and design strategies now pave the way for greater opportunities in both commercial and industrial sectors.

With heavy investment in research and development, Fulton has committed itself to a proactive approach to shifting markets, both domestically and abroad. For example, to fulfill the growing need for systems integration and controls, Fulton established an affiliate company, Synex Controls, in 2011. The integration of cutting edge controls technology with consumer needs has allowed Synex to establish itself as an innovator in the emerging facility HVAC management controls market.

Fulton's success can be attributed to its commitment to its core values, operating philosophy, and, most importantly, its people. "Fulton focuses on its relationships – both within the company and with business partners. We understand that this group is only as strong as the people who comprise it, so we value these people and foster healthy working relationships to maximize the benefits for



CONTINUOUS INNOVATION: Fulton now specializes in ready-to-ship skid-mounted and fully packaged boiler plant rooms to meet the current demand for off-site fabrication. The company puts great emphasis on providing sales and application advice and offering full commissioning and after sales service to a growing customer base in hospital and healthcare facilities, food and beverage processing, laundries, and other applications.

everyone involved," says Mark Banick, Fulton's Market Analyst and Communications Manager.

"Fulton has experienced many shifts that have helped make the company what it is today. Now, with more resources at our disposal than ever before, and a global marketplace made accessible through advances in technology, Fulton is in a position to bring new innovative designs and approaches to an ever-expanding market that reaches around the globe."



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Welcoming Women to Manufacturing

Some experts have suggested that if we solve the gender gap we'll be much closer to closing the skills gap. Are we ignoring half the population when they could be helping us solve a workforce problem of great magnitude?



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The existence of male- or female-dominated occupations has been a well-documented feature of the American workforce over the last century. Although they have largely disappeared from our current vocabulary, the terms “white collar,” “blue collar,” and “pink collar” aptly described certain workforce sectors in the ‘50s and ‘60s. During the ‘70s, the women’s rights and other social movements of the day began to shed light on some of the inequities in our workforce. Various societal pressures and government actions sought to address some of these issues and move us forward towards a more equitable workplace environment. “Equal employment,” “non-discrimination,” and “equal pay” crept into our vocabulary and we began to change the way we did business. One sector of our economy, however, seems to be stuck in the past on a variety of fronts. That sector is manufacturing.

Back in the day, manufacturing was the epitome of blue collar. It meant long hours, backbreaking labor, harsh work environments (including mind-numbingly repetitive assembly lines), and often-hazardous working conditions. It was also male-

dominated and autocratically managed. In the talks I give on manufacturing, I refer to the four “D”s—dark, dirty, dangerous, and dying—as characterizing what the American public currently thinks of manufacturing. Unfortunately, as studies from the Manufacturing Institute have shown, we seem stuck in an outmoded perception formed 50 or more years ago. Even more troubling, the male-dominated nature of the industry continues to this day.

Women comprise approximately half of the country’s total workforce, but only about a quarter of the manufacturing workforce. A number of recent studies have sought to explain this imbalance and also suggest ways we might begin to rectify it. Contrary to the public’s perception, today’s advanced manufacturing environments are, for the most part, clean, well lit, climate regulated, environmentally friendly, safe, and filled with sophisticated computers and robotically-controlled machines. Laws to protect workers have largely eliminated heavy lifting, dangerous working conditions, and hazardous surroundings. Workplace programs emphasize quality control, continuous improvement, and lean practices that save money, increase productivity, and



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“We need to clear up the antiquated perception of manufacturing being tedious ‘men’s work’ conducted under poor working conditions and hidebound by rigid company cultures.”

provide for modern 21st-century work environments.

Several studies have predicted worker shortages resulting in as many as two million unfilled manufacturing positions over the next decade, much of that attributable to a skills gap. Some experts have suggested that if we solve the gender gap we’ll be much closer to closing the skills gap. Are we ignoring half the population when they could be helping us solve a workforce problem of great magnitude?

What causes this gender gap, what are some of the barriers keeping women out of manufacturing, and how can we begin to address the situation? Certainly we need to clear up the antiquated perception of manufacturing being

tedious “men’s work” conducted under poor working conditions and hidebound by rigid company cultures. In surveys, women cite fear of uncomfortable work relationships, lack of promotional opportunities, and low pay as disincentives to a career in manufacturing. More practical barriers for women include a lack of awareness of the different jobs available in manufacturing, a lack of skills training, and inappropriate educational preparation. Few of these negative perceptions are gender specific; they are also keeping young people in general from considering careers in manufacturing. Who would want to work in such environments?

What do women identify as contributing to a positive work environment? The studies have shown that interesting and challenging work assignments, attractive pay, and good work-life balance are motivators. Women consistently mention flexible work practices, mentorship and sponsorship programs, and positive role models as desired attributes in an organization.

Again, who would not want a work environment that offered such opportunities for growth and development?

//To bring more women into advanced manufacturing we must have clearly defined career pathways that lead to rewarding and well-paying jobs.//

As far back as 1999, Corning, Inc., one of MACNY's member companies, put together a program to increase the number of women in manufacturing. They identified a number of key strategies:

- work to recruit women into manufacturing positions;
- encourage managers to provide women with key developmental and networking experiences;
- analyze career paths to senior-level positions, thereby identifying and communicating feeder positions and key developmental experiences;
- ensure that women who are interested in manufacturing are included in succession planning;

- develop a manufacturing ladder to encourage movement between manufacturing and engineering;
- emphasize zero tolerance for any form of sexual harassment;
- and seek a balance between work and personal life, encouraging increased use of both formal and informal flexible work arrangements.

As a component of this program, diversity performance became part of every supervisor's review and their compensation was linked to this performance. Many of the elements advanced in the Corning program are still being recommended today. Let's review some current recommendations from today's literature:

- Top down leadership works – C-suite action can drive culture change – diversity and inclusion must be a business priority
- Address gender bias head-on – hostile work environments cost companies money
- Create more flexible work environments and foster work-life balance – explore creative options to fit the needs of today's workers
- Review recruiting practices, career pathways, and developmental opportunities – work with the educational system and other candidate pools to build pipelines into manufacturing
- Review job descriptions, pay structures, and promotional practices to align with workforce needs – dull, dead-end jobs and below average wages are long-term liabilities
- Publicize the opportunities available in today's advanced manufacturing – create publicity campaigns and use social media to reach tomorrow's workforce

These are just a few suggestions for improvement. Our educational system is still not producing a sufficient number of STEM graduates in selected industry sectors and women and minorities are not graduating from the programs that are in the highest-demand occupations. Our Career and Technical Education programs are still underutilized and not aligned with industry needs. Targeted government investments in training and education should focus on critical skill needs in industry. To bring more women into advanced manufacturing we must have clearly defined career pathways that lead to rewarding and well-paying jobs.

Manufacturing is critical to the nation's economy. Business leaders, government officials, and the educational community need to work together to improve the pipeline into manufacturing. No one sector can do it alone, but we can all contribute.



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I have noticed that women tend to emphasize certain values as they work and lead.

Compared to men, they seem to multitask better; be more ready to nurture relationships; seek to be inclusive; and more often maintain a long-term view.

Utilizing the Potential of Women in Manufacturing

Smart organizations know that to succeed tomorrow, they need to develop the right talent today. Many of our member organizations are struggling to attract the talent and skills necessary to be successful. Many of them realize that maintaining their competitive advantage will depend on building a bigger pool of top female talent.

In my own experience, I have noticed that women offer an important and uniquely different approach to life and leadership. At home, I have had the privilege of living with four women. My wife, Denise, is a pediatrician running a small medical practice. I also have three daughters,

two of whom have chosen to seek careers in manufacturing. One is an industrial designer who recently went to work for a U.S. consumer products company and the other is a mechanical engineer. At work I interface with a balanced-gender staff. Our female team members are integral to our success. Their approaches to work and leadership are somewhat different than mine and it has been both instructive and rewarding to be in such company.

I have noticed, to speak in generalities, that women tend to emphasize certain values as they work and lead. Compared to men, they seem to multitask better; be more ready to nurture relationships; seek to be inclusive; and more often maintain a long-term view. All of these are valuable attributes that we utilize here at MACNY. My observations seem consistent with what research is showing us about gender differences – and the opportunities they present.

Since the 1950s, hundreds of studies have confirmed that there are small, noticeable differences in leadership style between male and female managers. In a 2014 *Harvard Business Review* article, Harvard University professor Boris Groysberg compared definitions of personal and professional “success” by gender, based on interviews with almost 4,000 executives worldwide. He found that, relative to men, women attributed more meaning to individual achievement (46% vs. 24%, respectively); obtained more respect from others (25% vs. 7%); had more passion for work activities (21% vs. 5%); and made more of a difference (33% vs. 21%).

Research by Professor Alice Eagly at Northwestern University supports the observation that, on average, female leaders are more participative, collaborative, transformational, democratic, and use fewer transactional, authoritative, and “command-control” styles. Furthermore, a 2014 Gallup study found that, on average,

employees who work for a female manager are more engaged than those who work for a male manager. Women who reported to female managers had the highest level of engagement, at 35%; men who reported to other men reported the lowest, at 25%.

There is Still More Work to be Done

Countless books and articles have been written on what makes a great leader. Today, the role of gender in leadership may be under even heavier scrutiny. Even though more women are entering the workforce and advancing up the organizational ladder, they are still under-represented as leaders.

A 2014 Harvard Business School survey of MBA graduates found, for instance, that women were significantly less likely than men to have direct reports, to hold positions in senior management, and to have opportunities for career growth and professional development.

For example, according to a CNNMoney analysis, only 14.2% of the top five leadership positions at the companies in the S&P 500 are held by women. It’s even worse if you just consider the very top. Out of 500 companies, there are only 24 female CEOs. Simply put, the people in positions of power don’t match the world we live in. By most accounts, we do not have enough female leaders in our organizations and at the top of our manufacturers and businesses.

Another area where we need to increase women’s participation is in STEM careers – and specifically in computer science and engineering. When we look at the NSF statistics regarding the percentage of STEM bachelor’s degrees awarded to female students over the last two decades, we find that there is no gender difference in the biosciences, the social sciences, or mathematics, and not much of a difference in the physical sciences. The only STEM fields in which men genuinely outnumber women are computer science and engineering, where women comprise only 26% of the workforce.

With these realities in mind, we offer these profiles of women manufacturing leaders. We seek to educate our members about their success and to encourage members to tap into the wealth of opportunities available to them in hiring and promoting women within their organizations.

Kathy Alaimo, President, Syracuse Label & Surround Printing



How did you find yourself in a career in manufacturing?

I was fortunate to have tremendous opportunities while working in a small business. Syracuse Label had 16 employees when I started there as a billing clerk after college. Back in the early days we all had to wear many hats. As a result, I learned every aspect of printing while working my way up through the ranks.

Syracuse Label was founded by Roscoe Towne, in 1967, in a small garage in North Syracuse. It was primarily a printer of pressure sensitive labels. In 1987 the company was sold to Peter Rhodes and Dan Herrmann. Peter became the sole owner in 2000. Through succession planning, I became President in January, 2007. The company was sold to the employees in November 2007 through a 100% leveraged ESOP.

We have been 100% employee-owned for about eight years. Today we have 82 employees and state-of-the-art equipment to produce products for a host of industries. Currently, our company manufactures and supplies pressure sensitive labels, shrink sleeves, cartons, hang tags, roll-fed wrap labels, flexible packaging, and other printed products that surround our customers' products.

What do you find most fulfilling about operating a manufacturing business?

I enjoy watching the finished product come together. There is a lot that goes on behind the scenes to produce a quality printed

product. It's very satisfying to see our labels and packaging on a finished product out in the market.

What challenges do you find in being a woman in manufacturing?

I think the biggest challenge in manufacturing, whether you are a woman or a man, is keeping up with the constant change in our industry. Having the ability to embrace change is the key to success. My strength is in surrounding myself with industry professionals so that together we can produce a great product and satisfy the expectations of our customers.

What reasons would you give to a young woman to consider a career in manufacturing?

It's very fast-paced with plenty of opportunity. The sky is the limit for professional and personal growth. I think manufacturing is especially rewarding because, at the end of the day, you have created something that can be seen or used throughout the country.

What is one of the biggest challenges you have encountered at your company?

Our greatest challenge also became one of our greatest successes. There was a time in our history when we needed to make a drastic change in our company or we could have easily become a statistic. We had too many people and were not as efficient as our competition. We implemented lean manufacturing, which required moving each piece of equipment in our facility. We learned to work smarter, not harder, and with fewer people. We accomplished all this and reduced costs. Lean is a major part of our culture and our success today.

Was there someone who had a significant impact on you as a leader?

I've learned from many business associates that I have worked with throughout my business career. But the person that has most influenced my leadership style is Peter Rhodes. We have worked together for over 27 years. He shared his expertise in business and finance and, most importantly, in how to work with people in all areas of business, which, primarily, is to have integrity when working with employees, customers and vendors. Treating all your business partners honestly and fairly is the key to success.

What is the biggest challenge you see facing women leaders today?

Juggling family life and a busy career especially when the children are small is challenging but doable. Where there's a will... there's a way!



Anita Dungey, President, Auburn Leathercrafters



How did you find yourself in a career in manufacturing?

Although I have always worked in manufacturing, my current position as President of Auburn Leathercrafters came about when my husband's brother stepped out of the family business and my husband and I stepped in as owners and managers.

Auburn Leathercrafters is a third generation manufacturer of leather products to the pet industry. It was once Agway's full-service pet department supplier. In the years since, we've manufactured for various and diverse industries and manufactured and marketed our own line of dog collars and leashes.

What do you find most fulfilling about operating a manufacturing business?

Operating a manufacturing business, particularly one in the pet industry, allows me to use both my creative and analytic sides. From design to implementation to marketing, and from costing to analyzing cash flow, manufacturing is a sector that encompasses all aspects of business.

What challenges do you find in being a woman in manufacturing?

One of the biggest challenges is a challenge faced by women

in business in general: both men and women tend to look to men to make or negotiate a sale or purchase, as the case may be. However, I believe in my case, not getting sidetracked by negotiating has allowed me to manage a group of people who are experts in their positions rather than having to focus on some of the day-to-day conversations. It has allowed me to focus on the bigger picture.

What reasons would you give a young woman to consider a career in manufacturing?

It has been my experience that manufacturing allows a person daily opportunities to work in all levels of the production process — design, manufacturing, accounting, and marketing — because they are all interdependent.

What is one of the biggest challenges you have encountered at your company?

One of the biggest challenges I faced, particularly at the beginning, was finding my voice as a leader. Because I was stepping into an established family business with decades of habits and decision-making processes, leading them on their own turf, and dealing with customers and suppliers that they knew much better than I did, I often felt a little like an outsider. Time and a lot of listening before speaking and/or drawing any conclusions have made overcoming these challenges much easier. I've learned that it's important to listen to the experts and to not be afraid to make mistakes — because you will. Instead, learn from them, but don't dwell on them when you do.

Was there someone who had a significant impact on you as a leader?

Two people come to mind: My boss at MTR who taught me, in only a few simple words, to never assume anything. And my father, who taught me how to listen.

What is the biggest challenge you see facing women leaders today?

Finding one's own leadership style and deciding on the timing of launching a career are serious challenges. I received an invaluable insight many years ago as I was stepping into this leadership position: Someone observed that I was "old enough to have enough life experience and young enough to be able to make it happen."



Tina Hess, Founder and Chief Creative Officer, Corso's Cookies



How did you find yourself in a career in manufacturing?

It was never my dream to be a manufacturer, just the opposite. It was my dream to own a small bakery, decorating cookies for small custom orders. However, in 2006, fate would change that dream when we received a call from a national retailer with a request for more than 200,000 cookies. We saw that call as providing an opportunity to fill a void in the marketplace if we could figure out how to mass produce decorated cookies, something no other U.S. bakery had been able to do.

As a real estate agent, I would often make cookies for open-house events. Baking and decorating cookies eventually became a part-time business for me to make extra money. Once I had a website, the business quickly outgrew my home kitchen and forced me to make the decision to open my first bakery. My husband, who had a background in sales and marketing, became my business partner and together we grew the business to nearly one million in annual sales within the first three years of business.

What do you find most fulfilling about operating a manufacturing business?

Nothing is more fulfilling than watching an idea we developed from scratch go from the drawing board to the finished product

available on the shelves of some of the country's largest retailers and knowing that we've created something good enough to be enjoyed by people all over the country.

What challenges do you find in being a woman in manufacturing?

I don't know that I've ever felt like I faced any challenges specific to being a woman in manufacturing. I've always surrounded myself with great employees who have believed in our product and in me. They are the backbone of our business and as we've grown they have proved to be the most important ingredient in our success.

What reasons would you give a young woman to consider a career in manufacturing?

Manufacturing is the combination of so many different fields of study and talents that anyone can find a career path in manufacturing; whether you enjoy operations, accounting, sales, customer service, etc., it's got it all. It's a rewarding career because you are producing something, which brings a great feeling of accomplishment.

What is one of the biggest challenges you have encountered at your company?

The biggest challenge I face everyday is balancing work with family and raising three girls. Just as I've had the support and encouragement of our staff in building our company, I've also been blessed with the support of my parents in building our family. Without their help, we would not be where we are today.

Was there someone who had a significant impact on you as a leader?

My husband and business partner, Pete, has had an enormous impact on our company and on me as a leader. He was the one who encouraged me to turn my hobby into a business and who believed in me enough to risk his own career in building our company. His determination to grow our business has fueled my determination to build an operation that could support the sales he has been able to achieve.

What is the biggest challenge you see facing women leaders today?

I think the biggest challenge is finding the balance between work and home and letting go of the guilt that you're not giving enough attention to either. As a mother, it is imperative to me that I give my children the support they need to succeed. That sometimes gets in the way of living up to other people's expectations of what a great leader looks like or works like. But that is okay, and remember that is a challenge, as women, we have to overcome, because our children, are the future.



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The Women in Manufacturing ROUNDTABLE

The first Women In Manufacturing Roundtable examines the root problems and potential solutions to closing the gender gap in manufacturing.

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THE ROUNDTABLE: Left to right, Kathleen Carroll, Client/Waste Solutions Manager, Covanta; Barbara Stone, Director of Support Services, Crucible Industries, LLC; Christine Lindsey, Director of Human Resources, Tessy Plastics; Connie Hasko, Director of Human Resources, Chobani, LLC; Sherry DePerno, President/CEO, Advanced Tool Inc.; Mary Taylor, Senior Research Engineer, Test Engineering Department, SRCTec, LLC.

What will it take to attract more women to work in manufacturing? The question takes on urgency insofar as the gender gap contributes to the skills gap that is likely to result in an estimated two million U.S. manufacturing jobs going unfilled by 2025. To examine the reasons behind manufacturing's failure to attract, retain, and advance its fair share of women—who make up 47% of the labor pool but only 27% of the manufacturing workforce—The Manufacturing Institute, APICS, and Deloitte commissioned *The 2015 Women in Manufacturing Study*.

Based on responses from a survey of more than 600 female manufacturing professionals, the study identified a number of key areas that should be addressed to encourage greater representation of women in manufacturing. In response, MACNY recently brought together six accomplished CNY manufacturing executives for its first Women in Manufacturing Roundtable, providing local insights about a national problem. What follows are some of the highlights of the discussion.



“When I first started my career, I looked at being a woman in manufacturing—which was something of a rarity—as not a good thing. Today I know... this could not be further from the truth. Being a woman in manufacturing is empowering, it’s challenging, and it’s gratifying.

**Barbara Stone, Director of Support Services,
Crucible Industries, LLC**



“Pursuing a career within the manufacturing sector can be one of the smartest decisions a young woman can make. Jobs are plentiful, career advancement is boundless, and you have the opportunity to be engaged in building something amazing. It’s exhilarating.”

**Christine Lindsey, Director of Human Resources,
Tessy Plastics**

The majority of women who responded to the Women in Manufacturing survey believed that the single most important way to attract and retain more women to manufacturing was to improve the public’s perception of the industry overall.

Specifically, that would include diminishing the idea of manufacturing as a male-favored culture with inhospitable surroundings and a lack of creative and fulfilling work. The Roundtable participants addressed these issues head-on.

KATHLEEN CARROLL: The waste industry is still, in today’s world, mainly run by men. Although I was pleased to see more women than ever at MACNY’s Annual Meeting, I feel we still have a ways to go to catch up to men in this industrial environment in Central New York.

Women are often afraid of working for a garbage company—they have a perception they’d be working with dirty, filthy garbage. However, once a hiring prospect sees the facility and how we handle the waste, in nine out of 10 cases, their opinion is turned around and they become supporters of the facility.

CHRISTINE LINDSEY: Oftentimes, particularly with the parents, there is a stigma associated with a career in manufacturing, which in turn is reflected in their children. Manufacturing is still sometimes thought of as being dirty, grimy, old fashioned. There is an incorrect belief that the work isn’t creative and fulfilling and that the environment isn’t welcoming to women. This is not the case. Yet, because of this stigma, parents are not advocating or encouraging

their daughters to pursue mechanical or technical tracks in school.

Pursuing a career within the manufacturing sector can be one of the smartest decisions a young woman can make. Jobs are plentiful, career advancement is boundless, and you have the opportunity to be engaged in building something amazing. It’s exhilarating.

MARY TAYLOR: The perceived predominantly-male culture can put women off. The reality is that most companies have an inclusive culture that encourages women’s contributions to create a more diverse workplace.

If you work mostly with men, one challenge is to behave in a manner that is comfortable for you and not uncomfortable for your coworkers. You may think you have a professional demeanor but it can be perceived as too formal or even unfriendly. Though, if you are relaxed and show more personality you may be perceived as inappropriately personal or incompetent (flaky). It can take time to find the right balance.

CONNIE HASKO: Women in manufacturing, like other professionals, need to build trust and credibility in an organization. For women, that sometimes takes a bit longer and is tested.

BARBARA STONE: As many women realize, you have to find your professional voice and ensure that your t’s are crossed and your i’s are dotted. You have to be resourceful: you may not always have the answers, but you can network to find a solution or draw the answers out of your team.



MARY TAYLOR: Before women had a significant presence, the workplace culture tended to favor and reward based on “hard skills” and typically male behaviors. The men who worked then followed suit. The “soft skills” that many women and men naturally possess were not recognized as valuable in the workplace.

Fortunately, that has changed. Women tend to be collaborative, nurturing, caring, and have strong verbal and written communication skills. Now, companies value these “soft skills” and provide training on teamwork, mentoring, listening and conversation skills, and they encourage community service. The workplace improves for women and men when its members are encouraged to display a broader spectrum of behaviors.

SHERRY DEPERNO: Women thrive in the manufacturing environment—we are natural multi-taskers and great problem solvers.

Earlier in my career I faced challenges being a woman in manufacturing. I found men didn’t take me seriously. That was very intimidating especially when I still had so much to learn. Now I consider being a woman in manufacturing a great strength; women look at things differently, we bring an aspect to the table that might not have been thought of otherwise. Plus when you are in a competitive environment where everyone is trying to stand out in a crowd, I find being female in a very male world can be a great advantage.

CHRISTINE LINDSEY: Women bring a different perspective and a

balance to the workforce. Since so much of what needs to get accomplished requires problem solving, women in the workplace bring a lot of perspectives and methods of problem solving that are extremely useful.

CONNIE HASKO: The opportunities are endless for women who show initiative, are results oriented, collaborative, and are willing to learn. Manufacturing is about craftsmanship, being part of a team that creates great products, dynamic problem solving, team building, and giving people an opportunity to do their best – it’s all there – every day. When I think about the opportunities at Chobani – they are endless – whether in production, engineering, quality, R&D, there is so much potential for women.

BARBARA STONE: If they gave it a chance, women not only would enjoy a career in manufacturing, but would thrive in our sector’s current environment. As a woman in manufacturing, when I first started my career, this was more of a rarity. I looked at it back then as not a good thing. Today I know, after a long time

The biggest barrier to engaging women to consider manufacturing careers is that they just haven’t been exposed to it being a great option for them. They don’t realize how great women are in this field and what a satisfying career it can be.



"I like the story about three bricklayers. Each was asked what they were doing. The first replied: 'I'm laying bricks.' The second answered: 'I'm putting up a wall.' The third responded with pride: 'I'm building a cathedral.' Being a part of a larger, worthwhile effort is fulfilling; I take pride in my role in producing the end product."

**Mary Taylor, Ph.D., Senior Research Engineer,
Manufacturing Operations, SRCTec, LLC**



"We enjoy what we do, and we are here today talking about it, because we love it. I enjoy working in manufacturing and creating energy from waste... If young women could see firsthand the many benefits and gratification someone like myself has achieved in a manufacturing career, they might begin to see themselves doing something similar."

**Kathleen Carroll,
Client/Waste Solutions Manager, Covanta**

in the industry, this could not be further from the truth. Being a woman in manufacturing is empowering, it's challenging, and it's gratifying.

SHERRY DEPERNO: I think the biggest barrier to engaging young girls and women to consider manufacturing careers is that they just haven't been exposed to it being a great option for them. They don't realize how great women are in this field and what a satisfying career it can be.

But young women looking for a career in manufacturing need to find a mentor. They need to ask questions and see what it's really like. I think they will be surprised and inspired.

KATHLEEN CARROLL: We enjoy what we do, and we are here today talking about it, because we love it. I enjoy working in manufacturing and creating energy from waste for Covanta. I would find so much value and worth in guiding young women.

If they were to see firsthand the many benefits and gratification someone like myself has achieved in a career affiliated with manufacturing, they might begin to see themselves as doing something similar. I think there are many women out there just like us that would be thrilled to help tap into this amazing young talent pool of women and mentor them.

CHRISTINE LINDSEY: Too often, when women look to the work environment, there are not a lot of role models or examples

that would enable them to see themselves in the manufacturing environment.

MARY TAYLOR: Manufacturing is an active and exciting work environment. You don't know what you're missing if you haven't experienced it. To a young woman who is curious about manufacturing, I suggest you start by watching some episodes of the Discovery Channel's documentary series "How It's Made." Next, see if you can attend a tour of a local factory. If those pique your interest, look for any job you can do in a local industry, starting with a part-time or temporary position, if possible. This will expose you to the environment, opportunities and benefits available in a manufacturing career.

CONNIE HASKO: There is an energy in the manufacturing environment, in my opinion, that no other sector can match. In making products, Greek yogurt in our case, there is an energy, a pride, an excitement in being part of a craft, in the concept of rolling up your sleeves every day and making something special that people enjoy.

My advice to women who have even a flicker of interest in manufacturing is to talk to people. They should put together a list of the companies they admire or those that manufacture the products they love. Seek them out, ask questions. Remember that people want to help those that ask for it, so just reach out. Be sure to connect with MACNY and their resources, they offer a wealth of knowledge.



“Earlier in my career I faced challenges being a woman in manufacturing, I found men didn’t take me seriously. That was intimidating, especially when I still had so much to learn. Now I consider being a woman in manufacturing a strength; women look at things differently, we bring a range of fresh ideas to the table.”

Sherry DePerno,
President/CEO, Advanced Tool Inc.



“The most significant challenge in engaging women to consider manufacturing careers is changing the perception of manufacturing environments as noisy, dirty, unsafe, and unprofessional, and raising awareness of the opportunities, the excitement of rolling up your sleeves to make something special.”

Connie Hasko,
Director of Human Resources, Chobani, LLC

HOW THEY GOT THEIR START

KATHLEEN CARROLL: I got into manufacturing inadvertently, through an ad in the newspaper for a company called, at the time, Ogden. The job sounded very interesting and I liked the idea of working for a newer company in the midst of significant growth, one where I would be able to seek advancement.

SHERRY DEPERNO: I always knew, even as a young child, that I wanted to be an entrepreneur. Watching my parents build a business was an incredible starting point for me, and where I built this passion. Today, as President of my own company, I get to wear many hats: entrepreneur, problem solver, visionary, creator. I love seeing our business grow. I love what I do, and I want to mentor and encourage young women to see this opportunity within manufacturing as I did, and go for it.

CONNIE HASKO: For several years I was privileged to work with the NY wineries owned by Constellation Brands and appreciated the energy that surrounded those facilities. But when I walked into the Chobani plant in South Edmeston, NY in 2012 and toured the facilities with the plant director, it was unbelievable. I know I asked him a thousand questions that day – I was hooked.

CHRISTINE LINDSEY: I got into manufacturing by accident. Growing up, my dad was a sole-proprietor who owned his own

welding and fabricating business. As a result, my parents have never discouraged exploring any and all employment options. When I was looking to make a career change I saw an opening at Tessy and immediately knew it was a good fit for me.

BARBARA STONE: My first interest in manufacturing occurred while taking an Introduction to Operations Management class during my studies in the MBA program at Syracuse University. Although the operations principles could be applied to most any industry, it was manufacturing that caught my attention. How to make all things come together! The “spark” was solidified through joining APICS, American Production & Inventory Control Society, while attending SU. I was able to visit and network with many different manufacturing companies in the community. It was at one of the student chapter meetings that I met the person who was to be my first “boss” (in manufacturing).

MARY TAYLOR: My father, grandfather, and siblings all worked for manufacturing companies—my father worked for Xerox in Rochester, and my grandfather worked as a machinist at New York Air Brake. Xerox had an open house and families were invited to tour the facility. The plant was an interesting and busy workplace. I also had a summer job during college assembling cabinet hardware at a small local manufacturer.

More Renewable Energy for New York



Photo by victor/fliqstock

The State Energy Plan, released in June 2015, calls for 50% of energy generation to come from renewable energy sources by 2030. The primary sources for this new renewable energy will be new wind and solar investments.

As one of many Public Service Commission (PSC) proceedings investigating how to fundamentally change New York's power system, the New York State Energy Research and Development Authority (NYSERDA) has submitted a proposal for large-scale renewable energy, such as wind and solar plants. At the time of this writing, the PSC has taken comments on this proposal and decisions are expected in 2016.

Generally, the role of renewable energy generation and fossil fuels in the U.S. is not well understood. The U.S. Energy Information Administration's *2015 Annual Energy Outlook* (AEO2015) provides an overview of the scope of the situation.

Fossil fuels currently provide nearly half of electricity generation, a percentage expected to grow between now and 2040. This capacity will be increasingly fueled by natural gas. However, coal is expected to retain the largest share of energy generation until 2020, when natural gas generation will overtake it.

Nuclear power currently provides 20% of the electricity in the United States. While nuclear

power may not be considered renewable energy, it does not produce greenhouse gas emissions. Nuclear's share of total electricity generation is expected to decline, despite new nuclear plants being added.

Renewable generation currently provides 13% of U.S. electricity, a proportion expected to rise to only 18% by 2040. Solar and wind are expected to account for two thirds of the renewable energy growth over the next 25 years. Hydropower currently provides almost half of the United States' renewable energy, but its growth is limited. Wind power is expected to overtake hydropower by 2040. In the shorter term, renewables are expected to account for half of the new capacity being added between

now and 2022. This reflects the heavy influence of government policies, like the production tax credit, and state incentives, on renewable energy growth.

Overall increases in electricity capacity are expected to be slow, so the pace of renewable energy replacing other fuels as a source for electricity will also be limited.

The fuel mix in New York for electricity generation is cleaner than in the U.S. overall. Hydroelectric provides 18% of New York's power. Nuclear provides 30%. Renewables provide only 3.1% of electricity, if you exclude hydropower. Natural gas, at 47%, provides the bulk of the remaining power. Thus, even in a relatively clean state like New York, there is not a significant amount of electricity fueled by photovoltaic or wind power.

State seeks to more than double renewable energy within 15 years.

New York State has announced high goals for renewable power generation. Goal setting for renewable energy has been part of New York's energy policy for over a decade. The State's Renewable Portfolio Standard called for



increasing renewable generation to 25% by 2013. The result was an investment of \$1.1B by New York in large renewable energy projects. The State Energy Plan, released in June of 2015, calls for 50% of energy generation to come from renewable energy sources by 2030. So the change proposed is to get from 21% to 50% in 15 years. The primary sources for this new renewable energy will be new wind and solar investments.

To meet these goals, New York is attempting to support new private investment through a billion dollar Green Bank. It is also continuing to offer incentives for small and large solar projects, with another billion dollar investment. Again, the program objective is to support development of a renewable energy market that will provide private investment in projects.

Overall, the data would suggest that, to meet these objectives, we would need to generate more than 10 times as much solar and wind energy than we are generating today.

The Key Challenge

The nature of solar and wind energy mitigates against success in transitioning away from fossil fuels. Solar energy is only available during the day and has a real capacity factor of only 27%. Wind generally blows during off-peak hours; at night or in the winter. Its capacity factor is 34% overall. These sources of power are intermittent and therefore must have fossil fuel based generation available to fill in when renewables are not running. This results in additional costs, both in subsidizing prices for renewable energy, and in paying for the capacity needed to be on standby.

It is this challenge that is driving investment in energy storage. If the energy from solar and wind can be effectively stored, then its generation can serve when the need is present. Batteries have not been able to provide affordable storage for grid level applications. New types of batteries with lower cost and innovative materials are in active research and development stages. One report estimated the storage market could be worth \$13.5B by 2023, as new technologies are introduced. These innovations are required for renewable energy sources to meet New York's goals.

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Advances in Additive Manufacturing



The world's first 3D printed jet engine, created in 2015 at Monash Centre for Additive Manufacturing in Melbourne, Australia.

For the vision to be realized, additive manufacturing will need to displace the current production methods used for manufacturing plastics, metals and other materials.

The promise of additive manufacturing, commonly known as 3D printing, to revolutionize manufacturing is coming ever closer to being fully realized. Until relatively recently, the majority of 3D printing has been focused on rapid prototyping processes or on the manufacture of low-run plastic parts. Yet advancements in bio-printers, the introduction of multi-material printers, and improvements in speed and cost are hastening the timeframe of the 3D revolution.

Significantly, there has been a spate of recent investments in direct additive manufacturing facilities by major corporate players. General Electric, for example, is already employing additive manufacturing to produce fuel nozzles for the LEAP jet engine. Their process uses selective laser sintering (SLS) to heat and fuse cobalt-chromium powder. GE says the nozzles will be 25% lighter and 500% more durable than their conventionally formed predecessor. Similarly, Siemens is using SLS to create gas turbine blades that must withstand high-speed rotation and temperatures up to 1,400 degrees Celsius. The process will cut production time by more than 60% and reduce costs by 30%. Using additive manufacturing for parts intended for high-stress environments demonstrates that these technologies are beginning to fulfill their promise.

Also of significance is that these announcements

are about direct digital manufacturing. That is, the part is manufactured directly from the engineering specifications using additive manufacturing.

The Vision for Additive Manufacturing

Imagine that you need a spare part for the water heater in your home. There are several scenarios for how additive manufacturing can supply it. With the right equipment, you could digitize the part using a 3D scanner and then produce an identical part on your 3D printer. The savings from this process would include the cost of manufacturing and warehousing the replacement, order processing and shipping the part, and all the administrative tasks associated with the business of maintaining that water heater. Alternately, your plumbing company could download the specifications from the manufacturer and print the replacement part on its 3D printer. Perhaps easiest, the original equipment manufacturer who has warrantied a machine can respond to a part request by quickly printing the part to the original specification, never having to deal with the possibility of a replacement part being out of stock.

A similar revolutionary possibility exists for consumer goods of all sorts. For example, with the right 3D printer available, you could download the specifications for an item of clothing from your favorite designer and print it yourself, saving the costs associated with distributing the clothing.

You can see that additive manufacturing would impact the transportation industry as well. Instead of distributing high volumes of bulky finished goods, the transportation network may find itself conveying the compact raw material needed for local additive manufacturers to produce them.

Imagine that you have an inherited liver dysfunction and you need a liver transplant. If the technology progresses as it has in the last few years, your physician will be able to use your own cells to grow new tissue and print that into a functioning liver.

Indeed, 3D printing may be the only good solution for many highly customized and expensive products. Take the manufacture of prosthetics. Each person needs a custom device with individualized size and fit properties. Additive manufacturing permits the design to be altered to the specifications of each user, reducing the cost of manufacturing to that of the one customized unit.

For the vision to be realized, additive manufacturing will need to displace the current production methods used for manufacturing plastics, metals, and other materials. Processes like injection molding, blow molding, casting, milling, welding, and finishing have been key to reproducible, high-quality, high-volume manufacturing. Additive manufacturing will need to meet the cost, speed, and quality achieved by these best practices.

Fused deposition modeling of plastic materials is currently the most common type of additive manufacturing. Laser sintering, however, is the mode that is expected to grow the most over the next few years. Interestingly, consumer and energy industries are considered most likely to increase use of outsourced additive manufacturing. The growing number of additive manufacturing service centers is one manifestation of this trend. For example, Stratasys, one of the leading 3D printer companies, has opened The Stratasys Direct Manufacturing Facility. This service center will produce a part from uploaded 3D CAD data, in both thermoplastics and metals. Regional machine shops, such as Falso Industries, have instituted outsource service centers that specialize in small lot production and prototypes.

The aerospace and medical industries, with their need for high-value, low-volume objects, are most likely to grow their own internal capacity for additive manufacturing.

Barriers to Realizing the Vision

Selective Laser Sintering (SLS) machines, for printing in metals, are inherently dangerous, messy, and complicated. SLS lasers are powerful enough to melt metal at over 1500 degrees, the material is melted in gas chambers, and the resulting product still needs to be finished.

Additive manufacturing machines are also expensive. Professional SDS machines can cost a million dollars. As the technology improves, the cost of the machines will likely drop considerably.

There are limits to the number of materials that can be used in additive manufacturing. Also, the composition of some materials has been the intellectual property of the machine manufacturers, which has kept the price of those materials high.

One of additive manufacturing's key advantages is avoiding the need for expensive tooling and machine set up. However, once the traditional process is in place, the production process can be measured in seconds. In additive manufacturing, the time to produce a single item can be hours.

The need to further finish metal parts is also seen as a barrier. As 3D printers improve, this need may be reduced. But a sintered part can be rough and may require further milling or finishing to get the final product. Additionally, some additive manufacturing processes require curing the material to obtain the finished product.

Patents for the various techniques used in additive manufacturing have slowed competition. The expiration of the Stratasys patent for fused deposition modeling, in 2009, allowed for increased competition, innovation, and lower machine prices. Similarly, key patents for laser sintering expired in 2014, which may increase the number of companies competing in this sector over the next several years.

With the current pace of innovation, the barriers to achieving the additive manufacturing vision all seem surmountable. Thus, it is expected that the revolution will unfold over the next several years.



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C & S Companies	18
Carpenter Industries	2
Cathedral Candle Company	13
Chobani	16
Constellation Energy	33
Covanta Energy	36
Covey Computer Software	37
CPS Recruitment	42
Dermody, Burke & Brown, CPAs	34
Direct Energy Business	52
Dynamic Pak, LLC	34
Fust Charles Chambers LLP	33
Haylor, Freyer & Coon	42
INFICON	24
Jamestown Container	4
Klein Steel Service Inc.	19
Liftech Equipment Co.	39
Marquardt Switches	31
Mohawk Valley Community College	51
NBT Bank	16
QPK Design	10
The Fulton Companies	12
The Raymond Corp	6
Schneider Packaging	49
Seneca Savings	37
Stickley, Audi & Co.	8
Syracuse Label & Surround Printing	36
Visual Technologies	24

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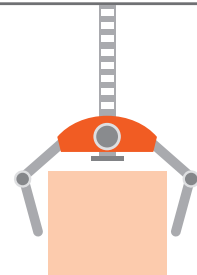
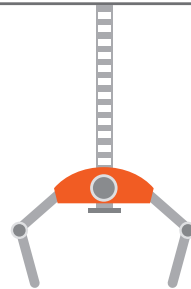


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