

Tracking the Biggest In-Plants

You have probably heard of the annual list of North American print-for-pay companies called the Printing Impressions 300 (see bit.ly/300-List). The companion piece to this on the print-for-cost side is the In-Plant Impressions 2023 Largest In-Plants research study (see bit.ly/In-Plant). Research like this is hard enough to conduct with commercial print service providers who may not always be willing to share financial and other relevant information publicly. Extracting comparable information from in-plants has its own special challenges. For US and Canadian in-plants though, there is much to be learned from the In-Plant Impressions study.

In-Plant Impressions' 2023 Largest In-Plants

One of the biggest challenges to gathering the data for this research is that many organizations are unwilling to provide information on internal departments. The result is that some very large US and Canadian in-plants do not appear on the 2023 list. The researchers also report that some in-plants that provided information in the past have opted not to participate in the most recent research. Still others provide only employee counts, but nothing further. This is unfortunate because the list in this research covers only 60 in-plants. That being said, the resulting study—which includes answers to questions on topics of vital importance to in-plants—provides remarkable insight on the state of the in-plant market.

The list is sorted in two ways. The first is by the number of full-time-equivalent employees. In cases where the number of part-time or temporary employee employees were provided, the researchers added half of these to the full-time figure. The second way is by the dollar value in sales. In cases where no sales figure was provided, the researchers used the in-plant's annual budget. Keep in mind that because of variations in fiscal years, these numbers may not align exactly one to another.

Of note are the following conclusions:

- **Some in-plants are seeing growth in staff.** By comparing 2023 reported figures to the previous year, the researchers concluded that 35% of the in-plants (21 of the 60 cited) have increased their staff in the past year.
- **Government in-plants dominate the Top 10 (by budget/sales).** Eight of the Top 10 in-plants (by budget/sales) are government printers, including many state-run in-plants.
- **Higher education in-plants dominate the Top 10 (by employees).** Higher education in-plants account for 43% of the list. While there are certainly a lot of higher education in-plants, it also seems likely that this sector is highly represented because the management is more forthcoming about providing data than companies in other sectors, such as finance.
- **In-plants can be massive.** This should come as no surprise, but the in-plants included in the Top 10 list have lots of employees. Nearly all of the Top 10 have at least 80 employees and the largest, the U.S. Government Publishing Office (GPO), has over 400



The report highlights trends including data on revenue growth, services provided, major challenges, the growth of wide-format volumes and equipment upgrade plans.

In reporting on perceived challenges, in-plant managers cited the following:

- **Automation tops the list of perceived challenges.** Large in-plants identified automation and reducing staff touches as the top challenge, followed by a related factor: productivity increases. Sourcing, competition with outside printers and staffing rounded out the top five challenges.
- **In-plants have shifted away from offset.** 54% of respondents said that they do all of their printing digitally. Across all respondents, the number of in-house impressions printed digitally was 84% (the median response was 100%).
- **Respondents are reporting revenue increases.** 73% of respondents reported some level of revenue increase. This is obviously very positive, but it should be tempered by the fact that struggling in-plants are less likely to have the time or inclination to participate in this survey.
- **Wide format volumes are expanding.** Wide format work accounts for 16% of print volume. In addition, 73% of respondents say that their wide format volumes have increased over the previous year.

The bottom line

The In-Plant Impressions 2023 Largest In-Plants provides important insight on market size and trends. In-plant managers should definitely participate in this research and strive to provide as much information to the creators of these documents as possible. In-plants can sometimes be overlooked in discussions of the overall printing market. This study helps solidify the importance of in-plants, even as the printing industry sees continued competition from digital media.

Source: Jim Hamilton, Consultant Emeritus at Keypoint Intelligence

Figure 1: The 10 Largest In-Plants by Number of Employees (Left) and Annual Budget/Sales (Right)

In-plant	Employees	
	2023	2022
1 U.S. Government Publishing Office	426	453
2 State of California	317.5	322.5
3 Brigham Young University	218	163.5
4 Church of Jesus Christ of Latter-day Saints	217.5	215
5 State of Washington	125	122
6 Church of Scientology, International	92	91
7 The World Bank	89	91
8 State of Oregon	84.5	86
9 CVS Health	80	NA
10 Oregon Corrections Enterprises	78	68

In-plant	Budget (\$)	Sales (\$)	Reporting Period End
1 U.S. Government Publishing Office	121,000,000	121,000,000	FY-S
2 State of California	83,140,000	83,078,000	FY-J
3 State of Washington	30,715,170	36,011,108	FY-J
4 State of Louisiana	31,000,000	30,089,000	FY-J
5 State of Michigan	21,263,957	21,263,957	FY-S
6 State of Oregon	17,486,000	NA	FY-J
7 Brigham Young University	NA	17,000,000	CY
7 State of Colorado	17,000,000	17,000,000	FY-J
9 University of Oklahoma	14,500,000	14,750,000	FY-J
10 State of Tennessee	14,084,089	13,010,330	FY-J

Source: In-Plant Impressions Largest In-Plants; 2023

Note: FY-S stands for Fiscal Year September, FY-J stands for Fiscal Year June, and CY stands for Current Year

BUSINESS MANAGEMENT

Get People Talking About Your Business

When a business goes “above and beyond” to meet your needs, you’re likely to tell the world about your positive experience – and you’ll do so in such a passionate and persuasive way that others will want to buy from that business, too.

So it’s no surprise that “Word of Mouth” is the most powerful form of advertising available. The same person who ignores online ads, deletes emails and throws direct mail directly into the trash can will take notice when their best friend gushes about the fabulous experience they had with your business.

What can you do to encourage people to talk about your company? Here are some ideas...

Exceed expectations

People rarely talk about average experiences, but they almost always talk about exceptional experiences – both good and bad. For example, a friend of mine once returned from a vacation to find water pouring out of his house. A

pipe had burst, and his home was flooded. His insurance company responded so quickly and so well that he ended up excited about what could have been a nightmarish experience! Of course, if it had been a nightmarish experience, you can bet that his 550 Facebook friends would have heard about that, too.

Offer a reward

Whether your referral program is formal or informal, always thank people for sending business your way. Write them a note, give them a coupon, send them a gift, take them to lunch... do something tangible to express your appreciation.

Distribute freebies

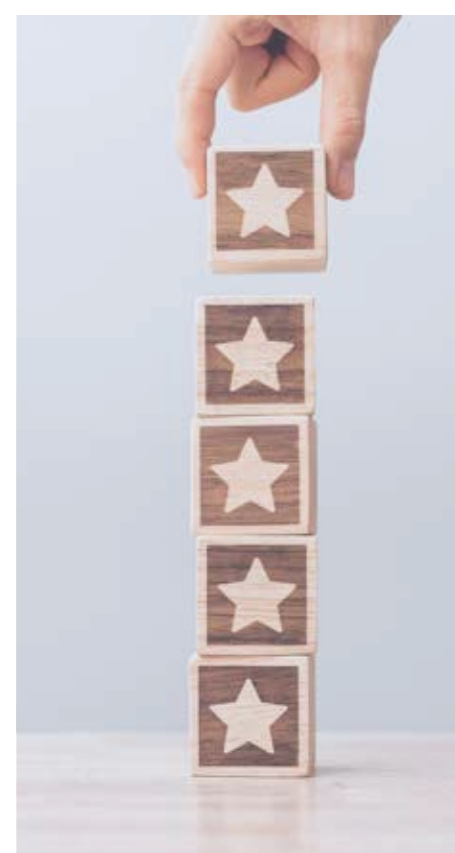
Stay top-of-mind by giving away useful items emblazoned with your company's name and contact information. Look for something your customers will use regularly. For example, a pet store could give away pet food covers or lint removers.

You can also give away something that makes your company's contact information easy to find when it's needed. This is what my appliance repair company did. I've got a magnet with their information on it stuck to the side of my washing machine.

Be professional in all you do

Treat everyone with a great deal of courtesy and respect. After all, customers are not the only ones who might talk about your business. Vendors, suppliers, employees, networking contacts, friends, family members, bloggers, etc., are all potential “spokespeople” for your business as well. Be especially mindful of how you handle complaints. In today's digital age, the news about one person's bad experience can quickly spread far and wide.

Source: Linda Coss, Plumtree Marketing, Inc., www.PlumtreeMarketingInc.com



Three HR Questions

What do you need to do if a candidate tells you they have a disability?

We recommend asking if they need an accommodation during the application process, but above all, ensure that having this information doesn't influence your hiring decision. The Americans with Disabilities Act (ADA) requires employers to provide accommodations to applicants with disabilities if needed to be considered for a job unless the accommodation causes an undue hardship. If the applicant doesn't need an accommodation, simply continue to focus on the candidate's skills and abilities relative to the position you're hiring for.

As you're likely aware, employers are prohibited from asking about disabilities before offering an applicant the job. As a best practice, you should be asking all candidates—not just those who disclose a disability or appear to have a disability—whether they can perform the essential functions of the job with or without a reasonable accommodation. This can be as simple as adding a question to your job application.

It's important to not make assumptions about a candidate's ability to perform their job based on their disability. If a candidate, during the post-offer stage, requests an accommodation to perform the essential functions of their job, then you would engage in the interactive process with them to determine what accommodations may be effective.

Are there topics you shouldn't talk about during an interview?

Are there questions or topics you should avoid during the hiring process? How can you be sure you don't accidentally get into one of those topics?

You should avoid asking questions that could be viewed as discriminatory or that infringe on a candidate's privacy. Essentially, you want to avoid any questions that are not directly related to the candidate's ability to perform the job. These would include questions about race, national origin, citizenship status, religious affiliation, disabilities, pregnancy (or desire to become pregnant in the future), sexual orientation or gender identity, past illnesses (including use of sick leave or filing of workers' comp claims), age, genetic information or military service. You should also consider state laws that might apply, like prohibitions on asking for salary history or requesting that a candidate connect with you on social media so you can see what they post.

Asking these types of questions could result in rejected candidates claiming that the decision not to hire was based on their inclusion in these protected classes rather than job-related considerations. If you need information that might be related to a protected class, ask for it in a way that focuses on business needs. For example, if you

need someone who can work Sunday mornings, don't ask candidates if or when they go to church; instead, provide them with the position's schedule and verify that they're available to work those hours. If you need to ensure that a candidate can do a physical aspect of the job, ask them if they're able to do that task with or without accommodation, not if they have a disability that might interfere with their ability to do it.

Keep your questions and conversation focused on the job duties and the candidate's skills and abilities, and you'll be less likely to stumble into questions that could be discriminatory. If a candidate brings up their inclusion in a protected class, don't worry, but be sure to steer the conversation back to the job.

Do exempt employees get their full pay for partial-week furloughs?

Say you're planning to close your office a few days a week to save money. Do salaried exempt employees still get their full pay during these furloughs?

Yes, salaried exempt employees must be paid their full weekly salary if they do any work during your designated seven-day workweek, including tasks as quick as checking work email or voicemail. As your goal is to save money, be sure the furlough covers the full workweek and that affected exempt employees understand they're not to do any work while on furlough.

Nonexempt employees, however, only need to be paid for actual hours worked, so single-day or partial-week furloughs can be implemented without worrying about pay implications.

Source: HR|BIZZ



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STATE HAPPENINGS

Update from Our Lobbyist: Things are Heating Up!

We are now halfway through the legislative year and things are moving quickly. At this point we are in the middle of the "second house" committee hearings, where each bill that made it through its house of origin (i.e., Senate or Assembly) is now being considered by the other house.

This intense process starts in June and results in a frenzy of activity. The rush is due to the goal of completing these committee hearings before the legislature's one-month summer recess starts on July 3. After this recess, only one month remains before the legislative session ends, with the final two weeks reserved for floor sessions.

Artificial Intelligence has been a hot topic this year

Artificial Intelligence (AI) has been a prominent issue this year. With (AI) quickly becoming common in many spheres of business, many legislators feel that this is an area that needs regulation. For example, AB 2930 would regulate employers' use of a type of AI called "automated decision tools" to make consequential decisions. The goal is to ensure that these tools' algorithms do not result in discriminatory outcomes.

2022's SB 54 may be modified

SB 54 is the comprehensive packaging recycling legislation that created Producer Responsibility Organizations to pay for the full lifecycle of packaging. Senator Ben Allen, the author of the original bill, has written some bills that aim to fix/clarify some issues with the legislation. Other legislators have written bills that, if passed, would expand SB 54's scope.

Some of the bills that we opposed have been killed

AB 2200, which was another attempt to create a single payer health care system for the state, and AB 2751, the "right to disconnect" bill, are both dead.

Resilient Advocacy will continue to provide essential context and information, helping staff and legislators to counteract bills that would complicate business activities in California. We're optimistic that other bills hindering business operations in California will also be defeated.

Source: Resilient Advocacy, LLC, PIA's lobbyist in Sacramento

CLASSIFIED

FOR SALE:

2001 IBERICA-105 Machine Model: JR-105-5; Serial#: 2001261; Max Sheet size: 750mm x 1050mm; Min Sheet Size: 350mm x 400mm; Max Speed: 9,000 Impr/Hr; Machine Hours: 20,768 hrs; Cycles: 90,170,859,997. For more information, please contact Blanca Polanco at blanca@preferredpnp.com.

FOR SALE:

Seal 62 Laminator, Model # 63600, Serial # 600m039, Measures 80" L, 51"

H, 31" D. In good working order. Pictures available. For more information please contact Lane Weatherly at lweatherly@portlandpuzzle.com..

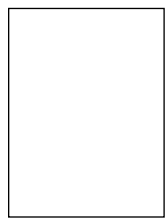
FOR SALE:

Polar Mohr 78, 30.7" guillotine paper cutter; HP Laser Jet Enterprise 700 Printer; Epson Perfection scanner, 4490 Photo, Model 192A; Letrojog paper jogger; Challenge Paddy Wagon padding press; RICOH full color, sheet-fed printer; Hewlett Packard full-color wide format, roll-fed printer; Canon full color; and

Image Program iPF8100. For more information, please contact Carol Prael at rcprael@olympus.net or at (360) 379-4922

FOR SALE:

Printing equipment. Press C, Plate Baker or Plate Baking Oven, Plate Processor, Carton Sealing Tape Machine, Stevens Press, 32" Polar Cutter, 45" Polar Cutter, Conveyor, Hamada 6665, Hamada RS-34 LM, Lawson Drill machine, Semi-Automatic Stretch Wrap Machine. Contact Martha Moreno at martha@printcola.com.



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PIA Events CALENDAR

- **Colorado Par-Tee on the Green**
WEDNESDAY, JUNE 26
Aurora, CO
bit.ly/Coloradogolf24
- **Independence Day Celebration**
SATURDAY, JUNE 29
10:00 AM - 4:00 PM PT
International Printing Museum
Carson, CA
bit.ly/PrintingMuseumIndpDay
- **Printing United Expo**
TUESDAY-THURSDAY,
SEPTEMBER 10 - 12
Las Vegas, NV
bit.ly/PrintingUnited24
- **LabelExpo Americas 2024**
TUESDAY - THURSDAY,
SEPTEMBER 10 - 12
Rosemont, Illinois
bit.ly/LabelExpo2024

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FOR FULL LIST OF EVENTS, PLEASE VISIT WWW.PIASC.ORG/EVENTS						