

Survey Results:

School District In-plants

A FEW things have changed since we last surveyed school district in-plants in 2005. Fewer of them run offset presses now. Four years ago, 90 percent had them; today just 79 percent are inking up presses. Digital color printing, on the other hand, has grown from 62 percent to 82 percent. More are likewise providing design services. About 66 percent handled design in 2005 and 80 percent offer it today.

While school district in-plants print many of the same items they did four years ago, there's been a noticeable increase in the number of shops that produce course materials, tests, posters and direct mail. Here are some other interesting facts we learned:

- 91 percent charge back for their services
- 71 percent compare charges with outside printers
- 61 percent market their in-plants
- 54 percent insource printing
- 33 percent have the right of first refusal
- 29 percent provide training opportunities to employees
- 18 percent have a high-speed digital color printer
- 8 percent operate a satellite printing/copying center

Our recent survey pulled in 86 responses. Here are the results:

The 20 Largest

Texas has the three largest school district in-plants, according to full-time employees.

	Full-time Employees
Houston ISD	36
El Paso Independent School District	21
Dallas Independent School District	21
Colorado Springs School District Eleven	18
Hawaii State Department of Education	16
Pinellas County Schools	16
Charlotte-Mecklenburg Board Of Education	14
Tucson Unified School District #1	12
Chesapeake Public Schools	11
Wake County Public Schools	10
Mesa Unified School District	10
Jefferson Parish Public School System	10
Cherry Creek School District No. 5	9
Evergreen School District #114	9
Portland Public Schools	9
Sarasota County School Board	9
Blue Valley Unified School District No. 229	8
Corona Norco Unified School District	8
District School Board of Pasco County	8
Traverse City Area Public Schools	7

Employees

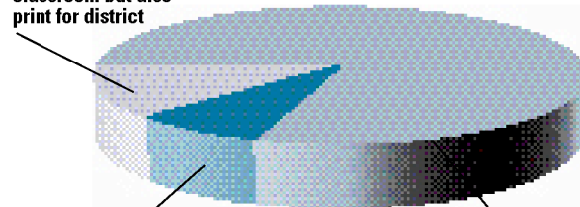
Average: 5.6 Median: 3

Teaching the Craft

20 percent of school district in-plants double as graphic arts classrooms.

12%

Predominantly a classroom but also print for district



8%

Mostly a print shop, some graphic arts instruction

80%

Typical in-plant (not a classroom)

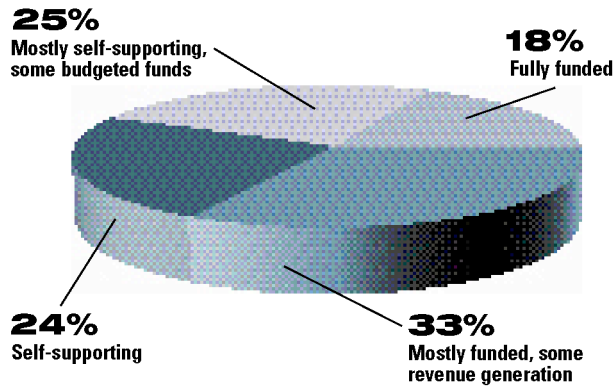
Annual Budget

Most school district in-plants have budgets under \$1 million.

Under \$100,000	22%
\$100,000 to \$249,999	26%
\$250,000 to \$499,999	16%
\$500,000 to \$999,999	18%
\$1 million to \$1,999,999	13%
\$2 million to \$2,999,999	0%
\$3 million to \$4,999,999	4%

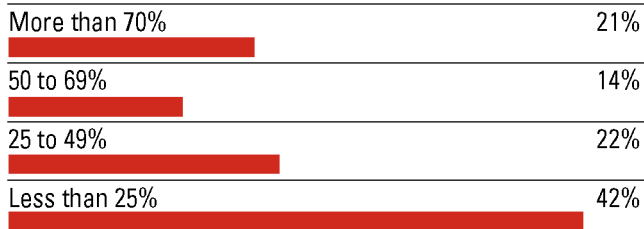
Funding Sources

Here's how school district in-plants get their financial support.



Digital Submissions

What percentage of work is sent to the in-plant digitally?



Services Provided

School district in-plants offer the following services:

Service	Percentage that oversee
Bindery	99%
Copying	86%
Prepress	83%
Digital Color Printing	82%
Digital B&W Printing	82%
Design	80%
Offset Printing	79%
Mailing	38%
Copier Program Management	26%
Scanning for Archival	22%
Proofreading	17%
Copyright Permission	16%
Fulfillment	14%
Data Center/IT Printing	12%
Photography/Videography	8%

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15", 18.5", 20", 23", 26.5", 30.5", 34", 37",
40", 45", 52", and 61" size cutters.

CHALLENGE

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Survey Results:

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Products Produced

	Percentage that produce
Business Forms, Newsletters	97%
Brochures	96%
Business Cards	91%
Stationery, Pamphlets	89%
Course Materials	88%
Envelopes	87%
Reports	80%
Calendars	78%
Posters	76%
Directories	75%
Tests	72%
Annual Reports	70%
Banners/Signs	62%
Direct Mail Pieces	59%
Catalogs	55%
Pocket Folders	28%
CDs/DVDs	18%
ID Cards	17%

Variable Data

41 percent produce variable data printing. They say VDP jobs account for an average of 9.4 percent of their overall printing. Here is the type of VDP they provide:

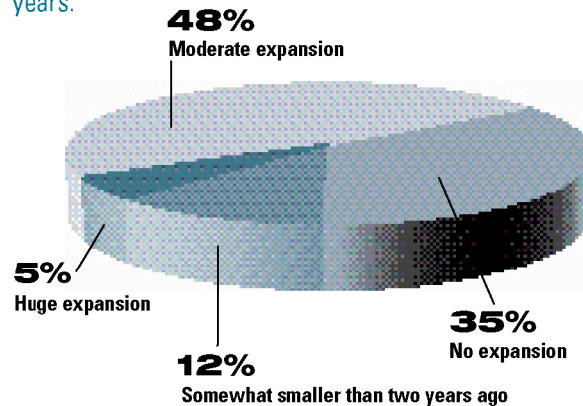
Address information	100%
Recipients' names	94%
Paragraphs of variable text	26%
Personalized messages on envelopes	23%
Images	23%
Color text	16%

Insourcing Sources

Other in-plants	17%
Other school districts	73%
Local colleges/universities	27%
Government organizations	63%
Non-profits	90%
Local businesses	12%

Recent Expansion

About 53 percent have expanded their shops in the past two years.



Web-to-Print

Most are still not using an online ordering/job submission system.

We use an off-the-shelf system	17%
We designed our own system	14%
No system yet, but we plan to get one	37%
No plans to add online ordering	32%

The Green Factor

This is how important environmental concerns are to school district in-plants:

Not very important.	9%
Somewhat important.	50%
Important.	41%
Crucial.	0%