



AMENDMENTS TO BPA WORLDWIDE BUSINESS PUBLICATION RULES

BULLETIN B 07-2

December 2007

Effective immediately, BPA Worldwide rules are amended as follows. (~~Deleted material is stricken through;~~ **new material is in bold italic typeface.**)

B7.13 Digital Publication

Multiple pages of content containing articles, graphics, or other features that are distributed electronically, as a unit and are subject to the rules governing separate Editions and the approval of the President. (Newsletters and Web sites do not qualify as digital publications.)

Digital and print publications may be further classified as "Versions" or "Editions." A Version must include the complete editorial of the original publication, but not the same advertising, layout or pagination. By comparison, a demographic Edition must contain at least 50% common editorial content with the original publication, and a geographic Edition must only have common editorial scope. For either type of Edition, layout, pagination and advertising do not need to be common. (See section B2.4 for additional requirements for Editions.)

Circulation for digital publications shall be audited to ensure that the systems of the media owner and their vendor are in compliance with BPA Worldwide rules and policies before such data can appear on a circulation statement. A special audit may be undertaken to verify the digital distribution.

The printing and release of an audit report shall be at the media owner's option. In all audit reports and circulation statements, digital circulation shall be detailed separately throughout the report. Individuals receiving both the print and digital publication shall be included only once within Paragraphs 1, 2, 3a, 3b, 3c, 4, and 9.

If an alert to a qualified subscriber (paid and non-paid) is undeliverable, the media owner shall have no more than 90 days to remove said subscriber from their circulation file, or ensure that the delivery details are corrected. (See Sections B7.24, B7.29, B9.13, B9.15, B9.16, B9.22, B9.22, B9.37.5, B9.47, B9.50, B9.73, B10.4.)

Digital publications with a frequency less than daily may provide the subscriber with an opportunity to "opt-out" of receiving an email alert notification of availability. If a publisher offers an opt-out to receiving the email alert, the publisher shall separately offer an opt-out of receiving the digital magazine. Subscribers who opt-out of receiving the email alert but have not opted-out of receiving the digital publication, need not receive an alert to be reported as qualified distribution all others must receive an alert for each issue.

B7.13 (continued)

Digital publications with a daily frequency may provide the subscriber with the option to “opt-in” to receiving an email alert of availability. An email alert is not required for publications with a daily frequency.

Digital non-qualified advertiser and advertiser agency copies and non-qualified paid digital copies (excluding sponsored) may be reported on the BPA worldwide circulation statements, and audit reports; all other non-qualified digital publication copies shall not be reported on BPA Worldwide circulation statements and audit reports.

B7.24 Multi-Copy Same Addressee Circulation

Two or more copies of the printed publication (whether or not individually wrapped and addressed) sent to a single addressee. This circulation shall be reported separately in paragraphs 1, and 3a of the circulation statement.

Only one copy of a digital publication may be considered qualified circulation per single addressee. (See B7.13) ***A publisher may disclose in “Additional Data” (Paragraph 11) of BPA reports, the number of authorized site licenses and users served as part of a site license agreement. However, one shall not be reported without the other. Reporting the name of the company to which the content has been licensed shall be optional. Licenses may be reported for definitive amounts only, “global” or “companywide” license agreements may not be reported.***

Multi-Copy Single Addressee circulation representing ***three or more*** ~~than two~~ copies sent to a single addressee shall be supported by a distribution agreement that is not more than three years old. Agreement may be: written and signed or emailed (with personal identifying question) or tape-recorded telecommunication. The document or tape recording shall indicate that the recipient agrees to accept the publication in bulk for redistribution to employees of the recipients' company. The document shall include the signatory's printed name in addition to the signature, the personal identifier or tape recording as appropriate. (See B9.9).

In those countries such as the People's Republic of China, Cuba, Vietnam, etc., where it is documented that the normal or required method of distribution is Multi-Copy, Same Addressee Subscription for redistribution through an official government department or designated organization, the publisher shall submit an official written request or communication from the government department specifying the number of copies of the publication for distribution.

Qualified Non-Paid Multi-Copy Single Addressee Circulation - May be reported as “Individual” copies in paragraph 1 of the circulation statement when the publisher has documentary evidence showing that the copies are redistributed to qualified recipients.

Qualified Paid Multi-Copy Single Addressee Circulation - May be classified as “Sponsored Individually Addressed” subscriptions in paragraph 1 and reported as single copies in paragraph 3a of the circulation statement only when the publisher has documentary evidence showing that the copies are redistributed to qualified recipients.

If the copies are purchased and the purchaser has a financial interest in the publication, those copies purchased may not be included in qualified circulation unless it can be proven to the satisfaction of the President that the sale was made for the benefit of the purchaser and not for the benefit of the publication.

B7.24 (continued)

Money collected from an agent for multi-copy subscriptions to the same addressee need not be remitted to the publisher provided necessary records are in place to document the purchase and price paid by the original subscribers or sponsor. However, each sponsorship sale transaction must be without monetary recourse to the purchaser (sponsor.) (See B10.8.)

Multi-Copy Single Addressee subscriptions cannot be reported as paid circulation after the expiration date.

B9.18

Those **publications** ~~medical journals~~ that obtain ~~over 90%~~ of their list from a list house **national medical association, i.e.** American Medical Association, American Osteopathic Association, or American Dental Association **in the United States, franchise** may waive the reporting of additions and removals **for recipients from those lists.** A footnote **in the "Additional Data" section of BPA reports (Paragraph 11)** will indicate ~~the reason for the omission of this information~~ **how many recipients originate from national medical association lists, i.e. AMA, ADA, and AOA, including individuals that have subsequently requested the magazine.,**

If a publisher uses copies of the same list for more than one issue, it shall be so noted in paragraph 11.

B9.47.4

International circulation shall be reported using the following regional breakout:

Asia	Caribbean
Middle East MENA (Middle East North Africa)	Central America
Europe	South America
Africa	Asia Pacific
North America	

Regions representing 0-4.9% circulation may report circulation by continent. Regions with 5.0% - ~~49%~~ **24.9%** circulation shall report circulation by country. Standard country breakouts are available for each region. ~~Regions~~ **Countries** with ~~50%+~~ **25%+** circulation shall report circulation by state/province **or other agreed upon market geographic breakdown** within any one country, using standard BPA Worldwide tables (**Canada, China, United Arab Emirates, United Kingdom, and the United States, available on BPA's website**). Where BPA Worldwide has not published a standard table and a publication has over ~~50%~~ **25%** of its circulation to any one country, **and the market would benefit from a standard table**, BPA Worldwide will work with the publishers in the market to establish a standard table.

B10.6

An accurate count of the recipients added to and removed from the qualified circulation shall be maintained issue by issue. This count shall be supported by printout proofs of the recipients added, and/or removed (See Section B7.1, of these Rules for definitions of additions and removals.)

Proof of classification as reported in paragraph 3a shall be available for all recipients on the qualified circulation mailing list. This proof may be no older than three years from the date of the issue analyzed. **If the classification in Paragraph 3a contains data that cannot change – such as year of medical school graduation – the proof may be older than three years from the date of the issue analyzed.**

B10.6 (continued)

Whenever a questionnaire is used to elicit information from a recipient, the questionnaire and attendant material shall not improperly lead the recipient to give the desired qualification data in order to receive the publication.

Whenever a questionnaire is used to elicit specific information about a recipient's business, except the establishments North American Industry Classification System (NAICS), a question approximating one of the following shall be asked on the form:

"What is your primary business? (Check one only.)"

"The primary business of my firm at this location is (Check one only.)"

"Please check the one item which best describes your firm's primary business activity. (Check one only.)"

Insert "Please indicate the primary end product (or service performed at your business location)

Letter by writing the corresponding letter of the alphabet in the box at the left."

Whenever a questionnaire is used to elicit specific information about an establishment's North American Industry Classification System (NAICS) (U.S.), a fill-in response question format approximating the following shall be asked on the form:

"What is the primary end product manufactured (or service performed) at your business location? (Please be specific.)" _____

But when eliciting information about an establishment's international Standard Industrial Classification (U.N.) a check-off response question format may be used with the above question.

Whenever a questionnaire is used to elicit specific information about a recipient's title, a question approximating one of the following shall be asked on the form:

"What is your title? (Check one only.)"

"What is your title? (Please be specific.)"

Whenever a questionnaire is used to elicit specific information about a recipient's job function, a question approximating one of the following shall be asked on the form:

"What is your primary job function? (Check one only.)"

"Please check the one category that best describes your primary job function. (Check one only.)"

"Job function (Please rank in order of importance 1, 2, 3, etc.)"

Insert

Letter "Please indicate your primary job function by writing corresponding letter of the alphabet in the box at the left."

B10.20.1

Telecommunications from individually qualified recipients requesting the publication may be reported as personal telecommunications request. Effective January 1, 2008, all outbound Personal Direct Request from Recipient: Telecommunication requests, **with the exception of subscriptions to individuals who refuse to be recorded**, must be recorded and made available to the auditor at the time of audit.

B10.20.2

~~Publishers electing to use a single telecommunication to elicit personal request~~ **Effective January 1, 2008, subscriptions to individuals who refuse to be recorded, and inbound telecommunication requests** shall comply with the following conditions:

A question approximating the following shall be asked and answered during the telephone interview: "Do you wish to receive (continue to receive) this publication? Yes ... No ... ~~If the publisher chooses not to record the call (an option only until January 1, 2008, after which all outbound personal request calls must be recorded)~~, A personal identifying question must be asked and answered. Some examples..." "To permit future verification of your request, please give us your month and/or date of birth - Month ... Day..., or mother's maiden name or high school graduated from." Other forms of personalized questions which only the recipient and not the publisher is likely to know, may be asked as an alternate should the recipient not provide an affirmative response to the original question. Once a particular question is used and the answer stored, a different question shall be used for future request questions. If the respondent refuses to answer any and all personal questions, the interview may be considered a request if the interview is recorded and the respondent indicates affirmative to the request question. The personalized question is not required for faxes, or if the interview is recorded.

If the call is being recorded, the publisher may use any of the following script options to obtain the request:

Option #1

Do you wish to receive this publication?

Do you wish to continue to receive this publication?

Option #2

All that I need to do is update your address information and ask you a couple of questions to send out your free subscription. We show that the subscription should go to (address). Is that correct?

All that I need to do is update your address information and ask you a couple of questions to send out your free subscription. We show that the subscription is going to (address). Is that still the correct address?

Option #3

In order to receive your free subscription to (publication name), I just need a few moments to update some information, ok? I have your name as...

In order to continue receiving your free subscription to (publication name), I just need a few moments to verify some information, ok? I have your name as...

Option #4

Hello. This is (caller's name) for/from (publication name) calling to update the information that we have on file so that we can begin sending you a free subscription to our publication, ok?

Hello. This is (caller's name) for/from (publication name) calling to update the information that we have on file so that we can continue sending you a free subscription to our publication, ok?

B10.20.2 (continued)

Option #5

Hello. This is (caller's name) from (publication name). I'd like to start your free subscription and just need to ask you a couple of questions to be able to do so. I have your address as (address). Is this correct?

Hello. This is (caller's name) from (publication name). I'd like to renew your free subscription and just need to ask you a couple of questions to be able to do so. I have your address as (address). Is this correct?

B10.20.3

A telephone interview form shall be submitted to BPA Worldwide for approval prior to its use. BPA Worldwide's approval will be given to any telephone interview form that:

Contains adequate instructions (script) to the telephone interviewer (outbound calls) or to the recipient (inbound calls), including a statement, in accordance with local laws, that the call is being recorded;

Contains the name, title, company address and telephone number of the recipient;

Contains an acceptable request question with a personalized data question, coupled to the request **for subscribers who refuse to be recorded**. (as defined in Section B10.20.2 above). The personalized data question is required only if the telephone call is not recorded;

Is consistent with the "Field Served" and "Definition of Recipient Qualification"; and

Is signed and dated by the interviewer for outbound calls and for inbound calls, is properly recorded by the receiver, signed and dated.

With the exception of name, address, title, email, fax, and phone number, prior-year demographic information shall not be confirmed during the telephone interview. Telemarketing vendors/agents shall not have access to the prior demographic information of a campaign.

B10.20.5

The qualified recipient's authorized assistant may request the publication on behalf of the qualified recipient. This may be reported as personal telecommunication request, provided the following conditions are met: **authorized assistant responds affirmatively to either one of these questions:**

"Do you provide administrative support for _____ that includes the ability to request subscriptions for him/her?"

"Do you provide administrative services for _____ and are you (allowed/eligible/permitted) to request a publication on their behalf?"

~~The authorized assistant shall confirm to the publisher that he/she provides administrative support for the qualified recipient.~~

~~The authorized assistant shall confirm to the publisher that he/she considers him/herself empowered to request a publication on behalf of the qualified recipient.~~

B10.20.5 (continued)

In one telephone interview, an authorized assistant may request a publication for more than one qualified recipient, and those requests may be reported as personal request (see Rule B10.29, Communication from Recipient or Recipient's Company (Other than Request): Telecommunication), provided the interview is recorded, and that there is a separate request question asked and answered for each recipient.

Publishers electing to contact an authorized assistant to elicit personal telecommunication request shall comply with the same conditions concerning telecommunication requests set forth in these rules. (See B10.20.5.) In addition, the publisher shall obtain the full name and job title of the authorized assistant.

B11.7

Whenever Membership Advisories of Correction are issued for a member for two sequential years **for any reason**, or audit reports are issued for three sequential years **due to errors and omissions within the same BPA statement paragraph, ie 3b, qualification source and age, that have been brought to the attention of the member in the previous audits** the Corporation shall not release the subsequent circulation statement without auditing it first. The publisher shall be billed the audit charge for this special audit in accordance with rates as established from time to time by the Board of Directors. In addition the matter will be brought to the attention of the Executive Committee for a review of the membership status of the publication for possible further action as provided for under Section B10.0 of the Bylaws.



**AMENDMENTS TO
BPA WORLDWIDE CONSUMER MAGAZINE RULES**

BULLETIN C 07-2

December 2007

Effective immediately, BPA Worldwide rules are amended as follows. (~~Deleted material is stricken through;~~ **new material is *in bold italic typeface.***)

C2.7

If, after consideration of the above conditions, the President determines that the magazine is, in effect, a single magazine, the publisher will be given the option to report the circulation and any special marketing data (i.e. Units, buying influence, etc.) of the supplement at the end of the regular circulation statement.

If the frequency of the supplement does not give cause to publish the supplement with the analyzed issue, and the publisher opts to report the supplement at the end of the regular circulation statement, an additional analysis and audit test will be required of the issue which includes the supplement.

The supplement shall have the same recipient qualification and shall serve the same field within a business or service market as the host magazine.

The qualified recipients on the lists shall be in the same business, occupation, etc. The supplement's recipients may be a subset of the host magazine's qualified recipients.

The supplement shall be identified separately on advertising rate source material and in circulation promotion. In advertising rate source material, separate reference to each supplement's frequency, issuance and closing dates is required.

If the supplement does expand or increase the existing circulation base, it shall constitute non-continuous circulation and shall not be reported in the supplement circulation statement.

If, after consideration of the above conditions, the President determines that the supplement may be reported within the host circulation report the publisher, shall be required to report as follows:

C2.7 (continued)

Separate tables shall be used to report the supplement in Paragraph 4. Paragraph 4 shall include a footnote disclosing the recipient selection criteria.

Reporting of supplements shall be required in Paragraph 2 by issue date. Additions and removals shall be reported by issue, not by supplement.

All supplements shall be reported in accordance with the above. If the frequency of the supplement does not give cause to publish the supplement with the analyzed issue, a reporting of the supplement shall still occur in Paragraph 4 by reporting the results of the supplement's circulation selection criteria against the analyzed issue's circulation file.

C2.14

When a magazine has separate Editions **either print or digital**, such as demographic or geographic, the President shall determine whether the magazine is a single, qualified magazine or is, in effect, two or more separate magazines requiring separate memberships, circulation statements and audit reports. To qualify as a single magazine, the separate Editions shall meet all of the following conditions:

Shall have the same recipient qualification stated in the Market Served statement.

The qualified recipients on the lists shall be in the same consumer demographic or business, occupation, etc.

~~Shall have the same editorial content, with only such variations in editorial matter required by the different demographic or geographic audience(s) being served.~~

Fifty percent of the editorial content shall be common in words, not layout, between/among all Editions. Geographic Editions require only common editorial scope. In both types of Editions, advertising need not be common between/among Editions.

The Editions shall be identified separately on advertising rate source material **and in circulation promotion. In advertising rate source material, separate reference to each Edition's frequency, issuance and closing dates is required.**

The separate Editions shall be subsets of an existing circulation that do not expand or increase the magazine's circulation base and frequency of issue.

If the separate Edition(s) does expand or increase the existing circulation base and frequency of issue, it shall constitute Non-Continuous circulation, and shall be reported in a separate analysis in Paragraphs 2, 4, 5, and 6.

C5.29

When comparisons between two or among more magazines, BPA Worldwide Consumer circulation statements or audit reports are made, only the most recently released statements or audit reports for the same time period and as of the same date may serve as the basis for comparison. A publisher may extend the comparison back in time, if comparable figures exist for all magazines.

C5.29 (continued)

Members reporting on the June/December cycle and members reporting on the January/July (medical) cycle may compare circulation for the period ending June with July, and for the period ending December with January, even though there is a one-month variance in the report date.

If statements from the current and same time period are not available for all magazines in the comparison, the basis should be the preceding six-month circulation cycle. The comparison shall include the current time period for those magazines whose circulation statements are available, with the notation "not available as of [month/year]" for appropriate magazines.

C7.5 Back Copies

Any issue of the magazine dated prior to the current issue shall be considered a back copy whether served to a new or requalified/renewed recipient. The "current issue" is defined as the most recent issue ~~mailed~~ **distributed** or placed on sale, whichever comes first.

Back copies may be counted as either qualified paid or non-paid circulation only for one issue immediately preceding the issue current at the time the recipient is ~~mailed~~ **distributed** the back copy for magazines other than weeklies or for two issues for weekly magazines.

When the recipient has specifically requested back copies of a magazine such copies may be counted as qualified circulation up to three issues preceding the date of the subscription order for all magazines.

If a publisher wishes to back start a controlled publication beyond one issue, the publisher shall separately ask the recipient if he/she wishes to begin the subscription with the back copy, and the recipient shall respond affirmatively. This question shall be separate from the original "request" to receive the magazine, for example:

Do you wish to receive XYZ publication?
Yes___ No___

If yes, do you wish to begin your subscription with the (back copy) issue?

All subscribers to receive back copies shall have qualification sources dated within the three-year qualification period for the audit year of the issue served. (See C7.26)

Special issues such as Directories or Buyers Guides are not considered when determining the numbers of back copies sent to qualified recipients.

To illustrate, XYZ monthly magazine ~~mailing~~ **distribution** analysis for the May issue (stated date of mailing the seventh of the previous month):

<u>Issue</u>	<u>1st Copy Placed On-Sale</u>	<u>1st Copy Mailed Distributed</u>	<u>Subsequent Mail Distribution Dates</u>
May	April 1	April 7	May 9*, June 11**, July 20**
June	May 11	May 12	NA
July	June 1	June 16	NA

C7.5 (continued)

- * late mailing **distribution** (See Section C9.20 of these Rules)
- ** late mailing **distribution** and ineligible back copy distribution; back copies of the May issue mailed **distribution** after the July issue was placed on-sale and are therefore non-qualified, regardless if copies are for paid or non-paid, new or renewed circulation.

C7.9 Digital Magazine

Multiple pages of content containing articles, graphics, or other features that are distributed electronically, as a unit, and are subject to the rules governing separate Editions and the approval of the President. (Enewsletters and Web sites do not qualify as digital magazines.)

Digital and print magazines may be further classified as "Versions" or "Editions." A Version must include the complete editorial of the original magazine but not the same advertising, layout or pagination. By comparison, a demographic Edition must contain the same editorial content, with only such variations in editorial matter required by the different demographic or geographic audience(s) being served. For either type of Edition, layout, pagination and advertising do not need to be common. (See C2.14 for additional requirements for Editions.) Circulation for digital magazines shall be audited to ensure that the systems of the media owner and their vendor(s) are in compliance with BPA Worldwide rules and policies before such data can appear on a circulation statement. A special audit may be undertaken to verify the digital distribution. The printing and release of an audit shall be at the media owner's option.

In all audit reports and circulation statements, digital circulation shall be detailed separately throughout the report. Individuals receiving both the print and digital magazine Versions shall be included only once within Paragraphs 1, 2, 4, 5, 6 and 7.

If an alert to a qualified subscriber (paid and non-paid) is undeliverable, the media owner shall have no more than 90 days to remove said subscriber from their circulation file, or ensure that the delivery details are corrected. (See C7.19, C9.9, C9.18, C9.19, C9.35, C9.39, C10.4.)

Digital publications with a frequency less than daily may provide the subscriber with an opportunity to "opt-out" of receiving an email alert notification of availability. If a publisher offers an opt-out to receiving the email alert, the publisher shall separately offer an opt-out of receiving the digital magazine. Subscribers who opt-out of receiving the email alert but have not opted-out of receiving the digital publication, need not receive an alert to be reported as qualified distribution all others must receive an alert for each issue.

Digital publications with a daily frequency may provide the subscriber with the option to "opt-in" to receiving an email alert of availability. An email alert is not required for publications with a daily frequency.

Digital non-qualified advertiser and advertiser agency copies and non-qualified paid digital copies (excluding sponsored) may be reported on the BPA worldwide circulation statements, and audit reports; all other non-qualified digital publication copies shall not be reported on BPA Worldwide circulation statements and audit reports.

C7.19.1 Multi-Copy Same Addressee Circulation

Two or more non-sponsored copies of the print version of the magazine (whether or not individually wrapped and addressed) sent to a single addressee. This circulation shall be reported separately in paragraphs 1, 3d and 4 of the circulation statement. (See rule C7.10)

C7.19.1 (continued)

Only one copy of a digital version per single addressee may be considered qualified circulation. ***A publisher may disclose in “Additional Data” (Paragraph 8) of BPA reports, the number of authorized site licenses and users served as part of a site license agreement. However, one shall not be reported without the other. Reporting the name of the company to which the content has been licensed shall be optional. Licenses may be reported for definitive amounts only, “global” or “companywide” license agreements may not be reported.***

“Multi-Copy Same Addressee” circulation representing **three or more** ~~than two~~ copies sent to a single addressee shall be supported by a distribution agreement that is not more than three years old.

The agreement may be signed on hard copy and mailed, emailed (with personal identifying question) or tape-recorded telecommunication. The document shall indicate that the recipient agrees to accept the publication in bulk for redistribution. The document shall include the signatory’s printed name in addition to the signature, the personal identifier or tape recording as appropriate. (See C9.9.)

Agreements from a centralized office or headquarters may be permitted. For locations where the corporation is not empowered to, or does not have the authority to request such copies, redistribution agreements from each location will be required. The document shall include the list of locations where the copies are to be sent, with full address, telephone number, the quantity per location, and the contact person at the location.

Multi-Copy Same Addressee circulation distributed in street racks is permitted, provided that permission is obtained to place racks in public. Such permission must be provided by the municipality governing the public space.

Multi-Copy Same Addressee circulation shall be fully explained in the circulation statement, and in paragraphs 4 and 8 through notation. The explanation shall provide the details of the character and nature of multi-copy circulation, how it is distributed, price received, if any, and any other amplification necessary.

In those countries where it is documented that the normal required method of distribution is multi-copy, same addressee subscriptions for redistribution through an official government department or designated organization (e.g., the People’s Republic of China, Cuba, Vietnam, etc.), the publisher shall submit an official written request or communication from the appropriate government department, which specifies the number of magazine copies distributed.

Qualified non-paid Multi-Copy Same Addressee Circulation may be reported as “Individual” copies in Paragraph 1 of the circulation statement when the publisher has documentary evidence showing that the copies are redistributed to qualified recipients.

Qualified paid Multi-Copy Same Addressee Circulation may be classified as “Individual” subscriptions in Paragraphs 1 and 4 of the circulation statement only when the publisher has documentary evidence showing that the copies are redistributed to qualified recipients.

Copies purchased in lots of 10 or fewer that promote the interests of the sponsor/donor and are sent to a single addressee, and otherwise conform to the definition of qualified paid circulation, shall be reported as “Multi-Copy Same Addressee.” (See Rule C7.19.2.)

C7.19.3 Pertaining to Both Multi-Copy Same Addressee and Sponsored Multi-Copy Same Addressee circulation:

Multi-Copy Same Addressee and Sponsored Multi-Copy Same Addressee subscriptions cannot be reported as paid circulation after the expiration date.

If the number of subscriptions involved in any one Multi-Copy Same Addressee or Sponsored Multi-Copy Same Addressee sale exceeds 5% of the total average paid subscription claim for the period in which the transaction takes place, the subscriptions involved in that sale shall be separately and fully explained in Paragraph 8.

If a purchaser of such copies has a financial interest in the magazine, these copies may not be included in qualified circulation, unless it can be proven to the satisfaction of the President that the sale was made for the benefit of the purchaser, not for the benefit of the magazine.

Money collected from an agent for multi-copy subscriptions to the same addressee need not be remitted to the publisher, provided necessary records are in place to document the purchase and price paid by the original subscribers or sponsor. However, each sponsorship sale transaction must be without monetary recourse to the purchaser (sponsor). (See Rule C10.8.)

“Multi-Copy Same Addressee” circulation representing three or more copies sent to a single addressee shall be supported by a distribution agreement that is not more than three years old.

The agreement may be signed on hard copy and mailed, emailed (with personal identifying question) or tape-recorded telecommunication. The document shall indicate that the recipient agrees to accept the publication in bulk for redistribution. The document shall include the signatory’s printed name in addition to the signature, the personal identifier or tape recording as appropriate. (See C9.9.)

Agreements from a centralized office or headquarters may be permitted. For locations where the corporation is not empowered to, or does not have the authority to request such copies, redistribution agreements from each location will be required. The document shall include the list of locations where the copies are to be sent, with full address, telephone number, the quantity per location, and the contact person at the location.

Multi-Copy Same Addressee circulation distributed in street racks is permitted, provided that permission is obtained to place racks in public. Such permission must be provided by the municipality governing the public space.

Multi-Copy Same Addressee circulation shall be fully explained in the circulation statement, and in paragraphs 4 and 8 through notation. The explanation shall provide the details of the character and nature of multi-copy circulation, how it is distributed, price received, if any, and any other amplification necessary.

C9.9

Method of Distribution shall contain a description of the means of distribution of the magazine ***shall contain one of the following statements concerning the distribution of a magazines reporting digital circulation, qualified Continuous and Non-Continuous circulation, or multi-copy same addressee circulation equal to 10% or more, but less than 25%, of average qualified circulation: -***

C9.9 (continued)

If digital Version circulation exists, the Method of Distribution shall be disclosed as follows: (See C7.9)

~~For Multi-Copy Same Addressee circulation for which delivery to the end recipient cannot be verified, the following comment shall be included as part of the Method of Distribution (Paragraph 8, Additional Data):~~

~~"Multi-Copy Same Addressee circulation is audited only to the point of distribution, not to the end recipient. A distribution agreement not more than three years old, indicating that the recipient at the point of distribution, or a centralized office or headquarters, agrees to accept the magazine for redistribution, has been obtained. Street rack copies are distributed with the permission of the municipality governing the public space."~~

~~These notations may contain additional explanations regarding the character and nature of the circulation and any other necessary amplification.~~

~~This paragraph shall also contain the following statement concerning the circulation of a magazine reporting qualified Continuous and Non-Continuous circulation in circulation statements and audit reports:~~

~~"All Qualified Circulation conforms to the terms of qualification as reported under the Market Served. Copies are distributed to individuals on a Continuous basis (at least three consecutive months) and on a Non-Continuous basis (up to three months' service). Continuous and Non-Continuous circulation are reported separately throughout this report."
(See C7.24.)~~

Digital Circulation

"Print copies are distributed via postal services or other carriers. Recipients who request the digital Version are notified via [disclose method: email, RSS, instant message, other] when the Version is available."

If Non-Continuous circulation exists, the nature of the Non-Continuous circulation shall be fully disclosed as follows:

Continuous and Non-Continuous Circulation

"Copies are distributed on a Continuous basis (at least three consecutive months) and non Continuous basis (up to three month's service). Continuous and Non-Continuous circulation are reported separately throughout this report."

If 10% or more, but less than 25%, of average qualified circulation is multi-copy same addressee, the following comment shall be included in the Method of Distribution.

Multi-Copy Same Addressee"

Multi-copy same addressee circulation is audited only to the point of distribution. An agreement not more than three years old has been obtained indicating that the recipient at the point of distribution agrees to accept the magazine for redistribution."

These comments may contain additional explanations regarding the character and nature of the distribution, and any other amplification necessary.

C9.9 (continued)

If trade show, consumer show, and convention distribution are reported as Qualified Circulation, the following comment shall be included as part of the Method of Distribution:

“Distribution to trade shows, consumer shows, and conventions are audited only to the event and not to the end recipients. An agreement from the event management has been obtained indicating that the event will accept a specified number of copies for redistribution. When the publisher exhibits and distributes copies at a show the following shall be stated: The publisher has provided a paid contract for exhibit space. Distribution to the event is supported by delivery receipts from a third party.”

(See C9.33, C10.17 and C10.24.1.)

C9.20

Total copies distributed (print and digital) must be equal to, or exceed the sum of total qualified circulation, advertiser/agency circulation, non qualified paid/request circulation, and rotated/occasional circulation, each issue.

If 15% or more of the total copies ~~mailed~~ **distributed** for an issue reported in Paragraph 2 are ~~mailed~~ **distributed** on or after the stated ~~mailing~~ **distribution** date or placed on sale date, which ever comes first, of the next issue, the completion date of ~~mailing~~ **distribution** for that issue shall be reported in Paragraph 8.

In the absence of a stated ~~mailing~~ **distribution** date for a magazine on either its rate card or in Standard Rate & Data Service, British Rates and Data, or Canadian Rates and Data, or similar magazine, the cover date shall be used to determine if copies of the magazine are ~~mailed~~ **distributed** late, e.g.,

- | | |
|---------------------|--|
| <i>Monthlies</i> | Copies would be late if mailed distributed on or after the 1st day of the next issue month (a January issue would be late if mailed distributed on or after February 1st). |
| <i>Bi-Monthly</i> | Copies would be late if mailed distributed on or after the last day of the second month of the issue (a January/February issue would be late if mailed distributed on or after February 28th). |
| <i>Semi-Monthly</i> | Copies would be late if mailed distributed on or after the last day prior to the next issue date (a January 1st issue would be late if mailed distributed on or after January 14th). |
| <i>Weeklies</i> | Copies would be late if mailed distributed on or after the last day prior to the next issue date (a January 1st issue would be late if mailed distributed on or after January 7th). |

Paragraph 8 shall report the percentage and number of copies which are ~~mailed~~ **distributed** late.

When magazines report separate editions in paragraph 2, this rule shall be applied separately to each edition.

C9.20 (continued)

If the magazine serves special issues (See C2.10), the special issue reported in paragraph 2 shall ~~mail-~~ **distribute** before the stated ~~mailing~~ **distribution** date of the next regular issue. In the absence of a stated date of ~~mailing~~ **distribution**, the special issue shall ~~mail-~~ **distribute** prior to the actual ~~mailing~~ **distribution** date of the next regular issue.

C9.35

Magazine members reporting print and digital Versions shall report such circulation in the following columns:

Total qualified Circulation

% of Total Qualified Circulation

Print Version Only

Digital Version Only

Both Print and Digital Versions (if applicable)

If applicable, the column "Both Print and Digital Versions" shall include each subscriber only once. The classifications for such subscribers shall be based upon the most recent qualification source for each piece of demographic information used to qualify subscribers of the print and digital Versions. (See C7.9.)

C9.46.3

~~Magazine members reporting digital circulation may, at their option, break out the digital copies served by geographic area according to the number of individuals who are being served only the digital Version and those that are being served both the digital and print Versions.~~

C9.46.12

International circulation will report the following regional breakout:

Asia

Middle East **MENA (Middle East North Africa)**

Europe

Africa

North America

Caribbean

Central America

South America

Asia Pacific

Regions representing 0-4.9% circulation may report circulation by continent. Regions with 5.0% - 49% **24.9%** circulation shall report circulation by country. Standard country breakouts are available for each region. Countries with 50%+ **25%+** circulation shall report circulation by state/province or **other agreed upon market geographic breakdown** within any one country, using standard BPA Worldwide tables (**Canada, China, United Arab Emirates, United Kingdom, and the United States, available on BPA's website**). Where BPA Worldwide has not published a standard table and a publication has over 50% **25%** of its circulation to any one country, **and the market would benefit from a standard table**, BPA Worldwide will work with the publishers in the market to establish a standard table.

C10.3 Circulation List

A printout proof or electronic file of all names on the qualified circulation list for the issue analyzed shall be provided for the auditor. A physical count of the circulation list shall be made by geographical distribution, and by the classifications shown in paragraph 4 of the circulation statements, **(including the date the demographic data was obtained)**. The classification count (by types of classifications) shall be compiled by state or other geographical area unless otherwise provided for by the President. Suitable forms for the tabulation of these counts will be supplied by the Corporation.

A publisher reporting new qualification figures in paragraph 5 in their interim circulation statement shall provide the auditor with a physical count of the circulation list.

C10.6

Proof of classification as reported in paragraph 3a shall be available for all recipients on the qualified circulation mailing list. This proof may be no older than three years from the date of the issue analyzed. **If the classification in Paragraph 3a contains data that cannot change – such as year of medical school graduation – the proof may be older than three years from the date of the issue analyzed.**

Whenever a questionnaire is used to elicit information from a recipient, the questionnaire and attendant material shall not improperly lead the recipient to give the desired qualification data in order to receive the magazine.

Whenever a questionnaire is used to elicit specific information about a recipient's business, a question approximating one of the following shall be asked on the form:

"What is your primary business? (Check one only.)"

"The primary business of my firm at this location is (Check one only.)"

"Please check the one item which best describes your firm's primary business activity. (Check one only.)"

Insert Letter "Please indicate the primary end product (or service performed at your business location) by writing the corresponding letter of the alphabet in the box at the left."

Whenever a questionnaire is used to elicit specific information about a recipient's title, a question approximating one of the following shall be asked on the form:

"What is your title? (Check one only.)"

"What is your title? (Please be specific.)"

Whenever a questionnaire is used to elicit specific information about a recipient's job function, a question approximating one of the following shall be asked on the form:

"What is your primary job function? (Check one only.)"

"Please check the one category that best describes your primary job function. (Check one only.)"

"Job function (Please rank in order of importance 1, 2, 3, etc.)"

C10.6 (continued)

Insert

Letter

"Please indicate your primary job function by writing the corresponding letter of the alphabet in the box at the left."

C10.19.4

Multiple magazine written request circulation forms or letters are acceptable and may be counted as written request circulation provided the following requirements are met:

The magazines offered shall be homogeneous in that they have similar terms of qualification and serve markets, special interest groups, businesses, industries, trades, occupations or professions with clearly defined limits.

A separate signature *or initial (publisher's option)* from the subscriber is necessary to establish a request for each magazine.

The questionnaire must be signed.

The text of the solicitation shall disclose that multiple magazines are being offered.

A description of the editorial content which differentiates the magazines offered shall be included on the qualification card. The offer form shall display the different magazine logos to increase differentiation amongst titles.

A question approximating the following shall be asked on the form:

SIGN OR INITIAL HERE IF YOU WISH TO RECEIVE MAGAZINE XXX

SIGN OR INITIAL HERE IF YOU WISH TO RECEIVE MAGAZINE YYY

SIGN OR INITIAL HERE IF YOU WISH TO RECEIVE MAGAZINE ZZZ

Signature

Date

C10.20 Personal Direct Request from Recipient: Telecommunication

C10.20.1

Telecommunications from individually qualified recipients requesting the magazine may be reported as personal telecommunications request. **Effective January 1, 2008, all outbound Personal Direct Request from Recipient: Telecommunication requests, with the exception of subscriptions to individuals who refuse to be recorded, must be recorded and made available to the auditor at the time of audit.**

C10.20.2

~~Publishers electing to use a single telecommunications to elicit personal request.~~ **Effective January 1, 2008, subscriptions to individuals who refuse to be recorded, and inbound telecommunication requests** shall comply with the following conditions:

A question approximating the following shall be asked and answered during the telephone interview: "Do you wish to receive (continue to receive) this publication? Yes ... No ... ~~... **If the publisher chooses not to record the call (an option only until January 1, 2008, after which all outbound personal request calls must be recorded), A personal identifying question must be asked and answered.**~~ To permit future verification of your request, please give us your month and/or date of birth - Month ... Day..., or mother's maiden name or high school graduated from."

Other forms of personalized questions which only the recipient and not the publisher is likely to know, may be asked as an alternate should the recipient not provide an affirmative response to the original question. Once a particular question is used and the answer stored, a different question shall be used for future request questions. If the respondent refuses to answer any and all personal questions, the interview may be considered a request if the interview is tape-recorded and the respondent indicates affirmative to the request question. The personalized question is not required for faxes, or if the interview is tape-recorded.

If the call is being recorded, the publisher may use any of the following script options to obtain the request:

Option #1

Do you wish to receive this publication?

Do you wish to continue to receive this publication?

Option #2

All that I need to do is update your address information and ask you a couple of questions to send out your free subscription. We show that the subscription should go to (address). Is that correct?

All that I need to do is update your address information and ask you a couple of questions to send out your free subscription. We show that the subscription is going to (address). Is that still the correct address?

Option #3

In order to receive your free subscription to (publication name), I just need a few moments to update some information, ok? I have your name as...

C10.20.2 (continued)

In order to continue receiving your free subscription to (publication name), I just need a few moments to verify some information, ok? I have your name as...

Option #4

Hello. This is (caller's name) for/from (publication name) calling to update the information that we have on file so that we can begin sending you a free subscription to our publication, ok?

Hello. This is (caller's name) for/from (publication name) calling to update the information that we have on file so that we can continue sending you a free subscription to our publication, ok?

Option #5

Hello. This is (caller's name) from (magazine name). I'd like to start your free subscription and just need to ask you a couple of questions to be able to do so. I have your address as (address). Is this correct?

Hello. This is (caller's name) from (magazine name). I'd like to renew your free subscription and just need to ask you a couple of questions to be able to do so. I have your address as (address). Is this correct?

C10.20.3

A telephone interview form shall be submitted to BPA Worldwide for approval prior to its use. BPA Worldwide's approval will be given to any telephone interview form which:

Contains adequate instructions (script) to the telephone interviewer (outbound calls) or to the recipient (inbound calls) including a statement ~~at the outset of the telephone call if it is to be recorded.~~ ***in accordance with local laws, that the call is being recorded;***

Contains the name, title, company address and telephone number of the recipient.

Contains an acceptable request question with a personalized data question coupled to the re-request ***for subscribers who refuse to be recorded.*** (as defined in Section C10.20.2 above). ***The personalized data question is required only if the telephone call is not recorded;***

Is consistent with the Market Served and Method of Distribution.

Is signed and dated by the interviewer for outbound calls and for inbound calls, is properly recorded by the receiver, signed and dated.

With the exception of name, address, title, email, fax, and phone number, prior-year demographic information shall not be confirmed during the telephone interview. Telemarketing vendors/agents shall not have access to the prior demographic information of a campaign.

C10.20.5

The qualified recipient's authorized assistant may request the publication on behalf of the qualified recipient. This may be reported as personal telecommunication request, provided the following conditions are met: ***authorized assistant responds affirmatively to either one of these questions:***

C10.20.5 (continued)

“Do you provide administrative support for _____ that includes the ability to request subscriptions for him/her?”

“Do you provide administrative services for _____ and are you (allowed/eligible/permitted) to request a publication on their behalf?”

~~The authorized assistant shall confirm to the publisher that he/she provides administrative support for the qualified recipient.~~

~~The authorized assistant shall confirm to the publisher that he/she considers him/herself empowered to request a publication on behalf of the qualified recipient.~~

In one telephone interview, an authorized assistant may not request a magazine for more than one qualified recipient and be reported as personal request (see Section C10.20, Request from Recipient's Company: Telecommunication).

Publishers electing to contact an authorized assistant to elicit personal telecommunication request shall comply with the same conditions concerning telecommunication requests set forth in these rules (See C10.20.2). In addition, the publisher shall comply with the following condition:

C10.20.8

For incoming ~~transmissions~~ **requests** received through telecommunications equipment, adequate records verifying the time and date of call shall be maintained. In addition to the personalized request question, the recipient may be instructed to key a unique identification code taken from the publisher's label.

C10.20.9

Publishers shall be responsible for maintaining the following records which are to be made available to the auditor at the time of audit and/or during random visits:

All telephone company invoices.

All computer-generated data including summaries by date of calls received, telephone numbers of calls, placed and received, and computer logs of tasks performed.

~~Tape~~ Recordings, where permitted and available, shall be inspected by the auditor to verify adherence to the BPA Worldwide approved interview form and the proper recording by the interviewer of the recipient's response. Whenever conversations are ~~tape~~ recorded, the recipient shall be advised, ~~at the outset of the call that it will be recorded.~~ **in accordance with local laws, that he/she will be recorded.** Monitoring of live interviews also may be conducted for the same purpose.

C10.21 Personal Direct Request From Recipient: ~~Internet and E-mail~~ Electronic

C10.21.1

For those publishers wishing to accept requests via electronic medium (Web, email, other) a transcript (screen-by-screen panels) shall be submitted to BPA Worldwide for approval prior to use. BPA Worldwide's approval will be given to any electronic transcript that meets the following conditions:

Contains adequate instruction (menu and screen panels) to the recipient end user.

Contains a provision for the name, title, and company address of the recipient.

Contains an acceptable request question with a personalized data question to confirm the request (as defined in Section B10.20.2) and a provision for the date.

Incoming email correspondence that is not Web qualification-form generated and is requesting a publication does not need a personal data question. However, out bound solicitations for email requests must include a notification that the subscriber may be contacted by a third party to verify the publication request.

Documentation of the respondent's conformance to the Field Served and Definition of Recipient Qualification shall be available either through the electronic medium or a secondary source.

Web-based, single response, qualification questions may be pre-populated with prior-year information, provided the subscriber proactively verifies the data in each question by clicking a separate "confirm" button for each question. The request question ("Do you wish to receive/continue to receive XYZ Magazine?") cannot be pre-populated, unless the subscriber has demonstrated through an action ("i.e. click to subscribe") prior visiting to the qualification page.

C10.21.2

Multiple publication electronic requests are acceptable and may be counted as request circulation, provided that the following requirements are met:

Magazines offered shall be homogeneous, in that they have similar definitions of recipient qualification and serve businesses, industries, trades, occupations or professions with clearly defined limits.

A separate request from the subscriber is necessary to establish a request for each magazine.

The text of the solicitation shall disclose that multiple magazines are being offered.

A description of the editorial content that differentiates the magazines offered shall be included on the qualification card. The offer form shall display the different magazine logos to increase differentiation among titles.

C10.21.2 (continued)

A question approximating the following shall be asked:

Please check here if you wish to receive Magazine XXX

Please check here if you wish to receive Magazine YYY

Please check here if you wish to receive Magazine ZZZ

The forms must contain a personalized data question to confirm the request, as defined in Section C10.20.2.

C10.26.2

The following standardized questionnaires from another magazine shall be reported as

Communication from Recipient or Recipient's Company (Other than Request): Written provided the other Magazine is of the same parent publishing company:

Personal written request forms direct from the recipient.

Written request forms from the recipient's company.

Written communication forms from the recipient or from the recipient's company.

These sources shall age based on the qualification date of the original source document.

The quantity of names added to the file shall be properly identified in paragraph 8 additional comments, stating: "Communication from Recipient or Recipient's Company (Other than Request): Written" includes x copies or x% requests for XYZ Magazine."

Whenever 5% or more of the total circulation is qualified through questionnaires from another magazine, the number of sources used and the amount of circulation from those sources shall be disclosed in paragraph 8 as follows:

"Communication from Recipient or Recipient's Company (Other than Request): Written" includes [#] sources of circulation for quantities of [#] copies or [#]% to # copies or [#]%. "

The source shall be identified by name in a footnote in Paragraph 8 whenever 10% or more of the circulation is qualified through questionnaires from a single magazine.

C10.27.1

The following telecommunication to a media company shall be reported as Communication from Recipient or Recipient's Company (Other than Request): Telecommunication provided the other Magazine is of the same parent publishing company:

Personal telecommunication request forms direct from the recipient.

Telecommunication request forms from the recipient's company.

C10.27.1 (continued)

Telecommunication communication forms from the recipient or from the recipient's company.

These sources shall age based on the qualification date of the original source document.

The quantity of names added to the file shall be properly identified in paragraph 8 additional comments, stating: "Communication from Recipient or Recipient's Company (Other than Request): Telecommunication" includes x copies or x% requests for XYZ Magazine."

Whenever 5% or more of the total circulation is qualified through questionnaires from another magazine, the number of sources used and the amount of circulation from those sources shall be disclosed in Paragraph 8 as follows:

"Communication from Recipient or Recipient's Company (Other than Request): Telecommunication" includes [#] sources of circulation for quantities of [#] copies or [#]% to [#] copies or [#]%. "

The source shall be identified by name in a footnote in Paragraph 8 whenever 10% or more of the circulation is qualified through questionnaires from a single magazine.

C10.32.1

Business letterheads, company personnel rosters, company annual reports, company telephone directories, business cards, trade shows registration lists, reader service cards and qualification questionnaires from other ~~magazines~~ **publications not owned by the same parent company**. Such sources shall be adequately identified and dated to satisfy the auditor of their authenticity and acceptability.

C11.7

Whenever Membership Advisories of Correction are issued for a member for two sequential years **for any reason**, or audit reports are issued for three sequential years **due to errors and omissions within the same BPA statement paragraph, i.e. 3b, qualification source and age, that have been brought to the attention of the member in the previous audits** the Corporation shall not release the subsequent circulation statement without auditing it first. The publisher shall be billed the audit charge for this special audit in accordance with rates as established from time to time by the Board of Directors. In addition the matter will be brought to the attention of the Executive Committee for a review of the membership status of the publication for possible further action as provided for under Section B10.0 of the Bylaws.