



Business of Performing Audits

**AMENDMENT TO  
BPA INTERNATIONAL BUSINESS MAGAZINE RULES**

**BPA INTERNATIONAL RULE BULLETIN 03-01**

**May 2003**

Effective immediately, BPA International rules are amended as follows (*new material in bold italic typeface.*)

**BPA INTERNATIONAL RULES**

**B2.0 Eligibility**

**B2.10**

When a magazine has extra issues such as directories, catalogs or buyer's guides, the President shall determine whether the magazine is a single qualified magazine or is, in effect, two or more separate magazines requiring separate memberships and separate circulation statements and audit reports for each issue on the basis of the following conditions:

The extra issue is distributed to all or a specifically designated portion of the circulation list of the regular magazine.

The extra issue is identified on its cover as a special issue of the primary magazine.

The masthead of each issue reflects the frequency which includes the extra issue.

**B2.11**

If, after consideration of the above conditions, the President determines that the magazine is, in effect, a single magazine, the President shall require the magazine to report the extra issue (directories, catalogs or buyer's guides) in paragraph 2 of the circulation statement and audit report, but not in paragraph 1 if the extra issue is distributed to less than the identical circulation list as that of the regular magazine and a suitable explanation shall be made in paragraph 8 subject to audit.

**B2.12**

When a magazine has separate editions 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 for each edition. In order to qualify as a single magazine, the separate editions shall meet all of the following conditions:

Shall have the same recipient qualification and Market Served.

## B2.12 (continued)

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 served.

The editions shall be identified separately on advertising rate source material.

The separate editions are 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.

## B2.13

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 circulations for each edition separately. If the publisher opts to report each edition separately, the publisher shall be required to report as follows:

To report such editions separately in paragraphs 2, 4, 6, and 8 of the circulation statement and audit report.

To report such editions separately in paragraph 5 of the circulation statement and audit report when variances in the data between the editions exist to the extent of 10% or more in any of the categories reported in paragraph 5. When variances of less than 10% exist, the publisher shall have the option of reporting these data separately.

### **B2.6.1**

***When a publication has a supplement, as defined by local postal regulations, the President shall determine whether the publication is a single qualified publication or is, in effect, two or more separate publications requiring separate memberships, circulation statements and audit reports for each publication. In order to qualify as a single publication, the host publication and the supplement shall meet all of the following conditions:***

#### **B2.6.2 FOR ALL PUBLICATIONS**

***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.***

### **B2.6.3**

**Based on US Postal regulations, US based publications shall also conform with the following:**

***A publication supplement shall be one or more pages formed by one or more printed sheets that are not bound into the publication. A supplement may be devoted to a single topic and may contain material different from that in the host publication, but there shall be common editorial scope.***

***A loose supplement to a bound publication shall contain at least 25% non-advertising matter and bear the endorsement "Supplement to" followed by the title of the publication or the name of the publisher. A bound publication with one or more supplements not bound into the publication shall be enclosed in a wrapper. If a supplement to a bound publication is formed of more than one sheet, all sheets making up the supplement shall be bound together.***

***A supplement to an unbound publication shall be combined with and inserted within the publication. If the supplement is included loose outside the unbound publication, the publication and its supplement shall be enclosed in a wrapper or envelope, and the supplement shall bear the endorsement "Supplement to" followed by the title of the publication or the name of the publisher.***

### **B2.6.4**

**Based on UK Presstream regulations, UK based publications shall also conform with the following:**

***Supplements (excluding catalogues, directories, brochures, product cards and loose inserts) which do not constitute separate periodicals-either available for purchase or distributed in their own right-shall be related to a periodical and distributed to the same address list as the periodical itself.***

***The supplement shall carry on its front cover the date/month/season and title of the periodical to which it is a supplement. The supplement shall be published by the same publisher as the periodical.***

### **B2.6.5**

**For all other publications, local postal regulations and definitions of a "supplement" shall prevail.**

### **B2.7**

***If, after consideration of the above conditions, the President determines that the publication is, in effect, a single publication, 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.***

B2.8

When the President determines that the publication is, in effect, a single publication, but the publisher wishes separate circulation statements and audit reports for each edition **or supplement**, separate memberships will be required. **When** ~~if the~~ editions **or supplements** are reported separately, additional audit fees shall be charged at a prorated hourly rate for all audit time spent over the allotted hours for the combined total distribution of all editions **or supplements** as set by the Board of Directors.



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**BPA INTERNATIONAL RULES**

**B5.46**

***A member shall not reproduce entire BPA International Business Publication Audit statements or audit reports, or simulate the format and/or typeface used in BPA International Business Publication Audit statements or audit reports, without permission of the BPA International President.***

Electronic distribution, (including faxing, and email, posting to the Web,) of entire BPA International circulation statements or audit reports is permissible. ***Print-on-demand media kits incorporating an entire circulation statement or audit report are also permissible.***

***For all Printing-on-demand where the stock of paper used is not the designated color of the BPA report, the following comment must be included in the print-on-demand copy: "AN ORIGINAL OF THIS [TYPE OF STATEMENT] IS PRINTED ON [COLOR] STOCK. FOR AN ORIGINAL GO TO [www.bpai.com](http://www.bpai.com).***



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### **B7.29 Qualified Circulation**

That circulation for which the mailing address, conformance to the Field Served and Definition of Recipient Qualification, and correct classification in paragraph 3a are verified by auditable documentary evidence dated as shown in paragraph 3b of the circulation statement. (Reporting paragraph 3b is required for non-paid circulation and optional for paid circulation.)

For circulation to be identified as qualified "continuous" circulation, publication issued less than 14 times per year shall serve recipients at least six months of continuous service of the publication subject to normal removals and additions. For publications issued 14 times per year or more often, the publication shall serve recipients not less than three consecutive months of service subject to normal removals and additions (see Section B7.35, Rotated Distribution).

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

Individuals receiving copies of a digital version, may only be considered as qualified circulation if such copies are ***elicited through either personal or company request.*** ~~requested.~~

### **B9.37.5**

Publication members reporting print and digital versions shall report such circulation in the following columns:

Print Version Only.

Digital Version Only.

Both Print and Digital Versions.

The column "Both Print and Digital Versions" shall include each subscriber only once. The classifications for such subscribers shall be chosen by the publisher as long as the print source is personal direct request ***or request from recipient's company.*** If the print source is something other than personal direct request ***or request from recipient's company,*** the digital source must be used.



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**BPA INTERNATIONAL RULES**

**C2.0 Eligibility**

**C2.10**

When a magazine has extra issues such as directories, catalogs or buyer's guides, the President shall determine whether the magazine is a single qualified magazine or is, in effect, two or more separate magazines requiring separate memberships and separate circulation statements and audit reports for each issue on the basis of the following conditions:

The extra issue is distributed to all or a specifically designated portion of the circulation list of the regular magazine.

The extra issue is identified on its cover as a special issue of the primary magazine.

The masthead of each issue reflects the frequency which includes the extra issue.

**C2.11**

If, after consideration of the above conditions, the President determines that the magazine is, in effect, a single magazine, the President shall require the magazine to report the extra issue (directories, catalogs or buyer's guides) in paragraph 2 of the circulation statement and audit report, but not in paragraph 1 if the extra issue is distributed to less than the identical circulation list as that of the regular magazine and a suitable explanation shall be made in paragraph 8 subject to audit.

**C2.12**

When a magazine has separate editions 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 for each edition. In order to qualify as a single magazine, the separate editions shall meet all of the following conditions:

Shall have the same recipient qualification and Market Served.

## C2.12 (continued)

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 served.

The editions shall be identified separately on advertising rate source material.

The separate editions are 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.

## C2.13

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 circulations for each edition separately. If the publisher opts to report each edition separately, the publisher shall be required to report as follows:

To report such editions separately in paragraphs 2, 4, 6, and 8 of the circulation statement and audit report.

To report such editions separately in paragraph 5 of the circulation statement and audit report when variances in the data between the editions exist to the extent of 10% or more in any of the categories reported in paragraph 5. When variances of less than 10% exist, the publisher shall have the option of reporting these data separately.

### C2.6.1

***When a magazine has a supplement, as defined by local postal regulations, 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 for each magazine. In order to qualify as a single magazine, the host magazine and the supplement shall meet all of the following conditions:***

#### **C2.6.2 FOR ALL MAGAZINES**

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

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### **C2.6.3**

**Based on US Postal regulations, US based magazines shall also conform with the following:**

***A magazine supplement shall be one or more pages formed by one or more printed sheets that are not bound into the magazine. A supplement may be devoted to a single topic and may contain material different from that in the host magazine, but there shall be common editorial scope.***

***A loose supplement to a bound magazine shall contain at least 25% non-advertising matter and bear the endorsement "Supplement to" followed by the title of the magazine or the name of the publisher. A bound magazine with one or more supplements not bound into the magazine shall be enclosed in a wrapper. If a supplement to a bound magazine is formed of more than one sheet, all sheets making up the supplement shall be bound together.***

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***The supplement shall carry on its front cover the date/month/season and title of the periodical to which it is a supplement. The supplement shall be published by the same publisher as the periodical.***

### **C2.6.5**

**For all other magazines, local postal regulations and definitions of a "supplement" shall prevail.**

### **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.***

## C2.8

When the President determines that the magazine is, in effect, a single magazine, but the publisher wishes separate circulation statements and audit reports for each edition **or supplement**, separate memberships will be required. ~~When~~ ~~if the~~ editions **or supplements** are reported separately, additional audit fees shall be charged at a prorated hourly rate for all audit time spent over the allotted hours for the combined total distribution of all editions **or supplements** as set by the Board of Directors.



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**BPA INTERNATIONAL RULES**

**C5.45**

A member shall not reproduce entire BPA International Consumer Magazine Audit statements or audit reports, or simulate the format and/or typeface used in BPA International Consumer Magazine Audit statements or audit reports, without permission of the BPA International President. Electronic distribution, (including faxing, and email, posting to the Web,) of entire BPA International circulation statements or audit reports is permissible. *Print-on-demand media kits incorporating an entire circulation statement or audit report are also permissible.*

*For all Printing-on-demand where the stock of paper used is not the designated color of the BPA report, the following comment must be included in the print-on-demand copy: "AN ORIGINAL OF THIS [TYPE OF STATEMENT] IS PRINTED ON [COLOR] STOCK. FOR AN ORIGINAL GO TO [www.bpai.com](http://www.bpai.com).*



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### **C7.24 Qualified Circulation**

That circulation for which the mailing address, conformance to the market served, statement of circulation, and correct classification in paragraph 4 are verified by auditable documentary evidence dated as shown in paragraph 5 of the circulation statement. (Reporting paragraph 5 is required for non-paid circulation and optional for paid circulation.)

For circulation to be identified as qualified "continuous" circulation, magazines issued less than 14 times per year shall serve recipients at least six months of continuous service of the magazine subject to normal removals and additions. For magazines issued 14 times per year or more often, the magazine shall serve recipients not less than three consecutive months of service subject to normal removals and additions (see Section C7.30, Rotated Distribution).

Individuals receiving copies of a digital version, may only be considered as qualified circulation if such copies are ***elicited through either personal or company request.*** ~~requested.~~

### **C9.38**

The initial reporting of qualified circulation figures for paragraph 5 shall be in an audit report. Thereafter, new figures for paragraph 5 are required at least annually, concurrent with the end of the magazine's audit year.

The new data for paragraph 5 shall appear in the second circulation statement and in the twelve-month audit report. On the interim circulation statement qualification figures for paragraph 5 for continuous circulation may be obtained by repeating the percentages for continuous circulation from the latest audit report and applying them to the qualified circulation for the issue analyzed for the interim statement to arrive at the total continuous copies for each source.

This option is only available when the total qualified continuous circulation for the issue analyzed in the interim circulation statement is less than 10% above or below the total qualified continuous circulation for the issue analyzed in the latest audit report.

If a publication conducts a special six-month audit to change the audit year-end period (cycle), interim circulation data may only be projected from a printed/posted audit report.

**C9.38** (continued)

A publisher may report new figures in paragraph 5 in the interim circulation statement if new figures are obtained from a label printout count which shall be subject to audit.

***Magazines reporting qualified continuous and qualified non-continuous circulation shall require separate paragraph 5 analyses. At the publisher's option, a combined summary table may be provided. The percentages in each table should add to 100%.***

Magazine's reporting print and digital versions shall report such circulation in the following columns:

Print Version Only.

Digital Version Only.

Both Print and Digital Versions.

The column "Both Print and Digital Versions" shall include each subscriber only once. The classifications for such subscribers shall be chosen by the publisher as long as the print source is personal direct request ***or request from recipient's company***. If the print source is something other than personal direct request ***or request from recipient's company***, the digital source must be used. (See C7.9)