



**AMENDMENTS TO
BPA INTERNATIONAL BUSINESS PUBLICATION RULES**

BPA INTERNATIONAL BULLETIN 04-1

May 2004

Effective July 1, BPA International rules are amended as follows (~~deleted material is stricken through;~~
new material in bold italic typeface.)

B10.28 Communication from Recipient or Recipient's Company (Other than Request): Written

B10.28.1

The following types of records may be reported as written communication circulation:

Standardized questionnaires to an individual publication, such as:

Census forms.

Editorial survey forms.

Questionnaires which do not have the provision for the Yes/No request question.

Arrears unpaid for three months and credit subscriptions unpaid for six months where the subscriber has been transferred to controlled circulation.

Reader service cards to an individual publication (where the recipient has not signed the card and/or answered the question "Yes, I wish to receive (continue to receive) this publication)." Such communications shall have provisions for date and signature of recipient or by a member of the recipient's firm and shall bear evidence of the date of mailing by the recipient, or receipt by the publisher and proof of conformance to classification.

Non-deductible association or seminar subscriptions.

Expired one and two year paid subscriptions.

"Multi-Copy Same Addressee" circulation where the recipient at the point of redistribution has agreed to accept a specified number of copies for redistribution to qualified recipients. A written and signed redistribution agreement shall indicate the specific quantities requested, as well as the date requested. Agreements shall be obtained for no less than 95% of all points of redistribution, and for no less than 95% of the copies to be distributed.

B10.28.2

The following standardized questionnaires from another publication shall be reported as Communication from Recipient or Recipient's Company (Other than Request): Written provided the other publication 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.

B10.28.3

~~The following standardized questionnaires from another publication~~ **from another parent publishing company may shall not be reported as Communication from Recipient or Recipient's Company (Other than Request):** ~~written communication circulation even if the other publication is of the same publishing company.~~ **These are reported as "Other Sources".**

~~Personal written request forms from another publication.~~

~~Written request forms from another publication.~~

~~Written communication forms from another publication.~~

~~These are reported as "Other Sources".~~

**B10.29 Communication from Recipient or Recipient's Company (Other than Request):
Telecommunication**

B10.29.1

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

Personal telecommunication request forms direct from the recipient.

Telecommunication request forms from the recipient's company.

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.

B10.29.2

Telephone interview forms shall be submitted to BPA International for approval.

B10.29.3

BPA International's approval will be given to any questionnaire which is consistent with the Field Served and Definition of Recipient Qualification, and the classifications reported in paragraph 3a of the circulation statement.

B10.29.4

Questionnaires shall also contain the instructions to the telephone interviewers, the name and address of the firm to be called, the name and title of the person being interviewed, and provision for the operator's signature and date of interview.

B10.29.5

These forms shall be adequately identified and dated to permit the auditor to satisfy him/herself of their authenticity and acceptability.

B10.29.6

Whenever more than two copies of a publication are sent to the same addressee, a distribution agreement may be obtained via a telecommunication provided the agreement to distribute the copies is tape-recorded. The agreement shall indicate the specific quantities requested, as well as the date requested. Agreements shall be obtained for no less than 95% of all points of redistribution, and for no less than 95% of the copies to be distributed. (See B7.24)

B10.29.7

The auditor will compare and crosscheck telephone bills, interview forms, conduct confirmations and make any other tests considered essential to a complete and accurate authentication of this source. The publisher shall be billed for the costs incurred for any special tests.

B10.29.8

~~The following telecommunication questionnaires from another publication **from another parent publishing company** shall not be reported as **Communication from Recipient or Recipient's Company (Other than Request)**: telecommunication. circulation., even if the other publication is of the same publishing company. **These are reported as "Other Sources"**.~~

~~— Personal telecommunication request forms from other publications.~~

~~— Other telecommunication request forms from other publications.~~

~~— Telecommunication forms from other publications.~~

~~These are reported as "Other Sources".~~

**B10.30 Communication from the Recipient or Recipient's Company (Other Than Request):
Internet and E-Mail**

B10.30.1

The following types of records may be reported as Communication from the Recipient or Recipient's Company (Other Than Request): Internet and E-Mail:

Standardized questionnaires to an individual publication, such as:

Census forms.

Editorial survey forms.

Questionnaires which do not have the provision for the Yes/No request question.

B10.30.2

Internet questionnaires shall be submitted to BPA International for approval. BPA International's approval will be given to any communication that contains adequate instructions (menu and screen panel(s) to the recipient end-user and a provision for the name, title, company address and email address of the recipient.)

Prior testing of electronic scripts, systems and procedures for soliciting this form of communication may be required to determine auditability.

B10.30.3

BPA International's approval will be given to any questionnaire which is consistent with the Field Served and Definition of Recipient Qualification, and the classification reported in paragraph 3a of the circulation statement.

B10.30.4

These questionnaires shall be adequately identified and dated to permit the auditor to be satisfied with the authenticity and acceptability.

B10.30.5

Whenever more than two copies of a publication are sent to the same addressee, a distribution agreement to distribute the copies is confirmed by the respondent answering a personal identifying question. The agreement shall indicate the specific quantities requested, as well as the date requested. Agreements shall be obtained for no less than 95% of all points of redistribution, and for no less than 95% of the copies to be distributed. (See B7.24)

B10.30.6

The following standardized questionnaires from another publication shall be reported as Communication from the Recipient or Recipient's Company (Other Than Request): Internet and E-Mail provided the other publication is of the same parent publishing company:

Personal internet/email request forms direct from the recipient.

Internet/email request forms from the recipient's company.

Internet/email 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.

B10.30.7

Questionnaires from another publication from another parent publishing company shall not be reported as Communication from Recipient or Recipient's Company (Other than Request): Internet and E-Mail. These are reported as "Other Sources".

B10.34 Other Sources

B10.34.4

Qualification questionnaires from another publication from another parent publishing company shall continue to age based on the qualification date of the original source document. (See sections 10.27.1, 10.28.2, and 10.29.6).



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B10.21 Personal Direct Request From Recipient: Internet and E-mail

~~B10.19.12~~

B10.21.1

For those publishers wishing to accept requests via electronic medium (e.g., ~~bulletin board~~, **internet, and** electronic mail (E-mail), ~~diskette, etc.~~), a copy of, **or hyperlink to**, a transcript (screen-by-screen panels) shall be submitted to BPA International for approval prior to use. BPA International's approval will be given to any electronic transcript which contains:

- . . . adequate instruction (menu and screen panels) to the recipient end user.
- . . . a provision for the name, title, and company address of the recipient.
- . . . 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, not web qualification-form generated, 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.



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B9.35 Paragraph 3b (Qualification Source Breakout)

B9.35.1

Shall contain an analysis (count and percentage) of the qualified non-paid (and at the option of the publisher may contain an analysis of all qualified paid circulation) circulation by sources using 1, 2, and 3-year columns or any combination thereof. ***If, at the option of the publisher, paid circulation is reported and subscriptions sold for greater than three years have aged beyond three years, that circulation may be reported in the "three years" column with the change to "three+ years" as the column heading. Only paid circulation may be qualified for a period greater than 3 years.***

Paid subscriptions older than 3 years may not report demographic information in paragraph 3a, Business/Occupational analysis. All such subscriptions shall be reported as "other paid circulation" in paragraph 3a.

An explanatory paragraph shall be included in paragraph 11, Additional Data, stating the number of paid circulation aged beyond three years.

Non-paid circulation may not be aged beyond three years.

The issue analyzed shall be the same one as analyzed in paragraphs 3a, 3c and 4, except for the interim circulation statement where the qualification figures for continuous circulation may be obtained by repeating the percentages for continuous circulation from the latest audit report.



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B5.14

Circulation promotions and comparisons ~~Use of supplementary analyses for promotional and publicity purposes~~ may not promote or report only percentages of either respondents or total qualified. The qualified circulation count shall always be disclosed when reporting percentages, either as a total or for each individual number claimed. When reporting percentages of respondents, the base of respondents on which the percentage was calculated shall also be shown. (See B5.35)



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B7.13 Digital Version

Multiple pages of content that are distributed electronically as a unit. The digital version shall be a replica of the print version in terms of editorial (not advertising), subject to the rules governing separate editions and the approval of the President.

Circulation for digital versions shall be audited to ensure the systems of the media owner and their vendor are in compliance with BPA International 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 versions shall be included only once within paragraphs 1, 2, 3a, 3b, 3c, ~~and 4,~~ **and 9**. A table shall be reported in Paragraph 11 which details the gross copy count for both the print and digital versions.

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)



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B9.31.1

Only wording appearing in the current ~~NAICSSIC~~ government manuals and reports may be used., ~~with the exception that auxiliary units and government circulation will be coded as described in B9.31.6 and B9.31.7 below. An additional column of explanatory nomenclature may be used at the publisher's option.~~

Publisher members reporting under ~~NAICSSIC~~ shall use the **1997 NAICS**~~1987~~ government manual. Copies of the ~~NAICSSIC~~ manuals can be purchased from the National Technical Information Service, **US Department of Commerce, www.ntis.gov/naics**~~5285~~ Port Royal Road, Springfield, Virginia, 22161, Order No. ~~PB-87-100012.~~

B9.31.2

All qualified circulation shall be classified by **North American Industry Classification System (NAICS)**~~Standard Industrial Classification (SIC)~~, as defined by ~~NAICSSIC~~ manuals on the basis of **the processes used to produce goods or services**~~dominant end product of a manufacturing establishment or service of a non-manufacturing establishment.~~

B9.31.3

All qualified recipients in each establishment shall be uniformly classified in accordance with the **North American Industry Classification System (NAICS)**~~Standard Industrial Classification (SIC)~~ for the establishment. The method used in the uniform assignment of **North American Industry Classification System**~~Standard Industrial Classification~~ data shall be approved by the President.

B9.31.4

~~If 1% or more of the total qualified circulation falls into one major two-digit SIC group, such circulation shall be reported separately under the appropriate SIC group.~~

B9.31.5

~~Circulation comprising a SIC two-digit group which amounts to less than 1% of the total qualified may be combined with other circulation of SIC groups amounting to less than 1% of the total qualified circulation. The number of these combinations of less than 1% SIC groups is at the publisher's election. The Standard Industrial Classifications included in these combinations shall be listed.~~

B9.31.6 4

Central administrative offices and auxiliary units **shall be assigned the NAICS classification of the primary business activity**, when reported separately, shall be classified on the basis of the major two-digit group representing the primary activity of the establishment served. In addition, the third and fourth digit shall be classified according to the principal type of function performed as follows:

- ~~— 01 — Central district administrative offices~~
- ~~— 02 — Research, development or testing laboratories~~
- ~~— 03 — Warehouses~~
- ~~— 04 — Sales offices~~
- ~~— 09 — Other auxiliary units~~

B9.31.7

Publications reporting government circulation may classify their SIC terminology on the basis of the major two-digit group by the level of government operating the facility as follows:

- ~~— 91 — Federal Government~~
- ~~— 92 — State Government~~
- ~~— 93 — Local Government~~
- ~~— 94 — International Government~~

~~In addition, the third and fourth digits shall be classified according to the industrial activity in the major group (01-89).~~

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.

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)** Standard Industrial Classification, 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 an establishment's **North American Industry Classification System (NAICS)** ~~Standard Industrial Classification~~ (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.