



AMENDMENTS TO BPA WORLDWIDE BUSINESS PUBLICATION RULES

BULLETIN B 07-1

May 2007

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

B7.9 Benefit-of-Membership Subscriptions

Deductible Benefit-of-Membership subscriptions: Individual subscriptions paid for out of membership dues, where recipients have the option of deducting the subscription price from their dues if they do not wish to receive the publication.

Non-deductible Benefit-of-Membership subscriptions: Individual subscriptions paid for out of membership dues, where recipients do not have the option of deducting the subscription price from their dues, and automatically receive the publication.

Non paid subscriptions can only be reported as benefit of membership if the board of directors of the association/membership passes a board resolution stating the publication is a benefit of membership. The association/society does not need to own the publication for it to be a benefit of membership.

Associations/memberships purchasing subscriptions for their members shall not be reported as benefit of membership, such subscriptions shall be reported as sponsored sales (see rule B7.42).

Deductible and non deductible membership benefit subscriptions need not be the "official" publication of the association/membership.

The non-deductible offer may be for a digital Version of a publication without receiving a specific request to receive the publication digitally. (See section B10.19.14.) However, with each delivery of a digital copy (or its email alert), the member must be given the opportunity to opt out of receiving the copy in digital format. Those opting out shall be removed from the qualified circulation list within 90 days of receipt of the communication.

If you are reporting Paragraph 3b for source and age, deductible subscriptions are sourced as request circulation; non-deductible are sourced as Benefit-of-Membership circulation.

An annual membership communication (e.g., dues invoice, membership packet, promotional letter) shall clearly state the amount of dues allocated for payment of the subscription, and whether the subscription amount is deductible or non-deductible. If the magazine is to be sent in digital format, the communication must also include this disclosure.

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.)

B7.13 (continued)

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 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.

B7.29 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, publications shall serve recipients at least three months of continuous service of the publication, subject to normal removals and additions. ***Up to 5% of total qualified circulation may be served less than three months without further disclosure; over 5% must be reported as non continuous circulation (see 7.36)***

Normal addition and removal activity includes removing subscribers that indicate they no longer wish to receive the publication and non deliverable addresses.

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 either through personal or company request, or a non-deductible benefit-of- membership subscription. (See section 7.9.)

B10.21 Personal Direct Request From Recipient: Electronic**B10.21.1**

For those publishers wish 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.***

B11.7

Whenever Membership Advisories of Correction are issued for a member for two sequential years, ***or audit reports are issued for three sequential years*** 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 07-1

May 2007

Effective January 2008, BPA Worldwide rules are amended as follows. (~~Deleted material is stricken through;~~ **new material is in bold italic typeface.**)

C7.7 Benefit-of-Membership Subscriptions

Deductible Benefit-of-Membership subscriptions: Individual subscriptions paid for out of membership dues, where recipients have the option of deducting the subscription price from their dues if they do not wish to receive the magazine.

Non-deductible Benefit-of-Membership subscriptions: Individual subscriptions paid for out of membership dues, where recipients do not have the option of deducting the subscription price from their dues, and automatically receive the magazine.

Non paid subscriptions can only be reported as benefit of membership if the board of directors of the association/membership passes a board resolution stating the publication is a benefit of membership. The association/society does not need to own the publication for it to be a benefit of membership.

Associations/memberships purchasing subscriptions for their members shall not be reported as benefit of membership, such subscriptions shall be reported as sponsored sales.

Deductible and non deductible membership benefit subscriptions need not be the "official" publication of the association/membership.

The non-deductible offer may be for a digital Version of a magazine without receiving a specific request to receive the magazine digitally. (See section C10.19.14.) However, with each delivery of a digital copy (or its email alert) the member must be given the opportunity to opt out of receiving the copy in digital format. Those opting out shall be removed from the Qualified Circulation list within 90 days of receipt of the communication.

If you are reporting Paragraph 5 for source and age, deductible subscriptions are sourced as request circulation non-deductible are sourced as Benefit-of-Membership circulation.

An annual membership communication (e.g. dues invoice, membership packet, promotional letter) shall clearly state the amount of dues allocated for payment of the subscription, and whether the subscription amount is deductible or non-deductible. If the magazine is to be sent in digital format, the communication must include this disclosure.

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.)

C7.9 (continued)

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 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.

C7.25 Qualified Circulation

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

For circulation to be identified as qualified "Continuous" circulation, publications shall serve recipients at least three months of continuous service of the publication, subject to normal removals and additions. ***Up to 5% of total qualified circulation may be served less than three months without further disclosure; over 5% must be reported as non continuous circulation (see C7.32 Rotated Distribution)***

Normal addition and removal activity includes removing subscribers that indicate they no longer wish to receive the publication and non deliverable addresses.

Individuals receiving copies of a digital Version may only be considered as Qualified Circulation if such copies are elicited either through personal, or company request, or as a non-deductible Benefit-of-Membership subscription. (See C7.7.)

C9.13

The Average Qualified Circulation summary table shall list:

- Average Total Qualified,
- Average Rate Base,
- Variance figure expressed as copies above or below the average rate base and as a percent,
- Qualified circulation separated by Qualified Paid and Qualified Non-Paid, and the former further separating Subscriptions, **Sponsored and** Single Copy Sales.

C10.21 Personal Direct Request From Recipient: Internet and E-mail**C10.21.1**

For those publishers wishing to accept requests via electronic medium (e.g., internet, and electronic mail E-mail)), a copy of, or hyperlink to, 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 which contains:

- . . . adequate instruction (menu and screen panels) to the recipient end user.
- . . . a provision for the name and address of the recipient.
- . . . an acceptable request question with a personalized data question to confirm the request (as defined in Section C10.20.2) and a provision for the date.
- . . . incoming email correspondence, not web qualification-form generated, requesting a magazine 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 magazine request.
- . . . documentation of the respondent's conformance to the Market Served 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.**

C11.7

Whenever membership advisories are issued for a member for two sequential years, **or audit reports are issued for three sequential years** 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 magazine for possible further action as provided for under Section C10.0 of the Bylaws.