



BULLETIN B 11-1

December 2011

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

B2.9

Industry service providers, companies or individuals, applying for associate membership shall qualify as stated in Section B2.0 of the Bylaws and shall conform to the following requirements:

B2.9.1

Provide the names and contact details of three professional references that can attest to the applicants successful completion of BPA Worldwide related projects. It is allowable to provide one reference if a minimum of three projects were completed.

B2.9.2

Associate members who maintain successful ongoing completion of BPA projects are permitted to renew their membership on an annual basis.

B2.9.3

Reviews of performance will be completed for any associate member's work that negatively impacts BPA members or the industry. Those associate members who are found to be negatively impacting BPA members or the industry will be reviewed under Section 10 of the Bylaws (offences and penalties).

B7.14 Digital Magazine

Digital Magazine – A magazine (either with a companion print version or as a stand alone digital product) delivered periodically in a digital format with metered (i.e. linear) navigation that is edited, designed, and contains date-stamped content that includes advertising (but not necessarily the same advertising as might appear in a print version). Though editing, design, and issue identification (i.e. date-stamped content) are significant differences, the primary distinction between a digital magazine and a website is the metering (this can be pagination or any other method of going through the issue from beginning to end).

A digital magazine may be dynamically created, have targeted content, or may exist in parallel with pre-existing media.

B7.14 (continued)

Dynamic – Editorial can be created and/or selected at point of delivery. With a dynamic digital magazine, each recipient can receive a copy with different content and that content can change at any time.

Targeted – Editorial is changed for specifically defined groups and/or platforms before point of delivery. With a targeted digital magazine, each group of recipients, whether they are segmented demographically or because of the platform they use to receive the digital product, receive a copy with different content specifically selected for that group. Apart from minor updates, the content cannot change once the issue is made available.

Replica Plus Enhanced – If a print brand existed first, “plus” is editorial that is retained from the original edition and is redesigned and/or supplemented. With an enhanced digital product, each issue’s content is primarily taken (but not necessarily replicated in its entirety) from the original edition (whether in print or digital). Apart from minor updates, the content cannot change once the issue is made available.

Editorial Replica – If a print brand existed first, editorial and design are unchanged from the original print edition. With a replica digital product, each issue’s content and design are identical to the original edition. Apart from minor updates, the content cannot change once the issue is made available.

Publishers shall disclose in circulation statements under a “Statement of Content Platform” the form or combination of forms of digital magazine used per the above definition/ description.

Circulation for digital magazines shall be audited to ensure that the systems of the media owner companies and their vendors 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 magazines circulation shall be detailed separately **in paragraphs one and two, and may be reported separately** throughout the **balance of the** report. ~~Individuals receiving both the print and digital magazine shall be included only once within Paragraphs 1, 2, 3a, 3b, 4, and paragraph 3c, if reported.~~

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, B9.15, B9.16, B9.20, B9.35.5, B10.4)

Digital magazines 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 magazine, need not receive an alert to be reported as qualified distribution. All others must receive an alert for each issue.

Digital magazines 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~~ **may be reported on the BPA worldwide circulation statements and audit reports as non qualified circulation.**

Paid digital copies **and non-paid digital copies to individuals who meet the qualification criteria stated in the Field Served and Definition of Recipient Qualification**, may be reported on the BPA worldwide circulation statements, and audit reports. **Recipients who have not requested to receive the publication must first receive an email introducing the digital subscription along with the opportunity to opt out of receiving the publication.**

B7.14 (continued)

~~Only one copy of a digital magazine may be considered qualified circulation per single addressee. Digital magazine Site Licenses and Seats (individuals) served as part of the license shall not be reported as qualified circulation. A publisher may disclose the number of digital magazine site licenses and authorized seats, including paid and non-paid data, demographic data, license source and age data, and geographic data, using standard BPA Worldwide tables. 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. Qualified circulation and site license seats may not be summed on the BPA reports.~~

B7.26 Non-Qualified Circulation

That circulation which does not conform to the field served and definition of recipient qualification. This distribution is reported on the first page of the circulation statement.

~~Digital magazine circulation that meets the qualification criteria stated in the Field Served and the Definition of Recipient Qualification, but has not been requested (personal or company) or served as a benefit of membership shall may be reported as non-qualified circulation. If reported as non-qualified circulation, Evidence of conformance to the Field Served and Definition of Recipient Qualification, with proof of production, distribution and demographic data (no older than 36 months) shall be reported in the explanatory paragraph at the end of the BPA report. Without the reporting of the conformance, the copies may not be claimed as circulation.~~

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. ***On the analyzed issue, up*** ~~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 ***in all paragraphs within the circulation statement (see 7.36). Non-continuous circulation exceeding 5% for any issue reported in paragraph 2 must be detailed in the explanatory paragraph.***

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 request (direct or company) or a non-deductible benefit of membership subscription (See section 7.9). Publishers may convert requested print edition subscriptions to digital magazine subscriptions, provided the subscriber who requested the publication receives advance notice of the conversion and is given the option to refuse the conversion. The notice of conversion must give the publisher enough time to stop the conversion if the subscriber refuses to convert to a digital subscription. Evidence of the original request and the notice of the conversion shall be available at the time of audit.~~

B9.9 Field Served and Definition of Recipient Qualification

Shall contain a factual statement by the publisher of (a) Field and, (b) Recipient Qualification.

The statement shall describe in auditable terms the standards or qualifications employed by the publisher in determining who will receive the publication. Paid subscribers and single copy sales may be standards to establish qualification. If paid circulation without demographics is reported as qualified circulation throughout the BPA Worldwide circulation statement, this shall be disclosed in the Definition of Recipient Qualification.

Whatever the qualification standards may be, they shall be reported in classification breakouts in paragraph 3a of the statement. Only recipients who conform to these standards shall be included in the qualified circulation.

If Multi-Copy Single Addressee circulation of more than two copies to the same addressee of a company is 25% or more of the average qualified circulation, disclosure in the Definition of Recipient Qualification shall occur **describing the nature of the multi copy same addressee circulation (see B9.69)**. The following comment shall be stated:

"Also qualified are copies shipped in Multi-Copy Single Addressee to companies within the Field Served. A written distribution agreement not more than three years old has been obtained indicating that the recipient of the Multi-Copy Single Addressee copies agrees to accept the publication for redistribution to employees of the recipient's company."

If ~~more than~~ two copies are delivered to the same individual (duplicated copies) and exceeds 25% or more of the average qualified circulation, disclosure in the Definition of Recipient Qualification shall occur **describing the nature of the multi copy same addressee circulation (see B9.69)**. The following comment shall be stated:

"Also qualified copies are delivered as Multi-Copy Single Addressee within the Definition of Recipient Qualification. These include copies delivered to the same individual appearing on the qualification list more than once."

If 10% or more, but less than 25% of the circulation is of this condition, the comment shall be included under the explanatory paragraph, and may be reported in the Definition of Recipient Qualification.

These notations may contain additional explanations regarding the character and nature of the circulation and any other amplification necessary. (See B7.24)

B9.14 Average Non-Qualified Circulation

Shall report the distribution for the period covered in the following categories:

Advertiser and agency.
~~Non-Qualified Digital Magazines.~~
Rotated or occasional.
Allocated for shows and conventions.
All other

Any unsold or returned copies intended for single copy sales shall not be included in Average Non-Qualified Circulation. Unsold or returned copies are not included in BPA reports.

Digital non-qualified advertiser and advertiser agency copies, ~~non-qualified paid digital copies (excluding sponsored), and non-qualified non-paid digital copies that meet the qualification criteria stated in the Field Served and Definition of Recipient Qualification but have not been requested~~ may be reported in the non-qualified average on the BPA worldwide circulation statements and audit reports.

B9.15 Paragraph 1 (Average Qualified Circulation Breakout for Period)

All copies listed in the main section of Paragraph one fall in the Field Served and are directed to recipients qualified under the provisions of the Field Served and Definition of Recipient Qualification. This Paragraph will report Individual, Sponsored Individually Addressed, Benefit-of-Membership, Multi-Copy Same Addressee, and Total Qualified Circulation. Separate columns will list Qualified Non-Paid, Qualified Paid, Qualified Continuous (uninterrupted) service, Qualified Non-Continuous (interrupted) and Total Qualified Circulation.

For publications reporting digital versions, separate paragraph one's shall be included for individuals subscribing to the print version ~~only~~; individuals subscribing to the digital version ~~only~~, **and, if applicable**, individuals receiving both the print and digital versions, **in the explanatory paragraph. Total Qualified circulation shall be the unduplicated count, and shall be reported on page one.** (See B7.14)

B9.16 Paragraph 2 (Qualified Circulation by Issues for Period)

Shall report the total qualified circulation for each issue.

Additions and removals for each issue must be maintained but may be reported at the option of the publisher.

Shall report qualified **continuous** ~~uninterrupted service~~ and qualified **non-continuous** ~~uninterrupted~~ circulation separately for each issue.

Shall report qualified **gross** print and **gross** digital version circulation separately, **along with the total qualified circulation consisting of unduplicated unique recipients** for each issue. ~~Individuals receiving both the print and digital versions shall be counted only once. If applicable, a separate count of such subscribers shall be included for each issue. (See B 7.14)~~

B9.19.1 Paragraph 3a:

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

- Total Qualified Circulation
- % of Total Qualified Circulation
- Print Version ~~Only~~ **(optional)**
- Digital Version ~~Only~~ **(optional)**

~~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 B7.14.)~~

If the publisher elects to report print and digital versions, total qualified circulation throughout the table shall consist of unduplicated unique recipients.

B9.35.5 Paragraph 3b:

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

- Total Qualified Circulation
- % of Total Qualified Circulation
- Print Version Only (*optional*)
- Digital Version Only (*optional*)
- 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 chosen by the publisher, as long as the print source is request (direct request or request from recipient's company). If the print source is something other than request, the digital source shall be used. (See B 7.14.)~~

If the publisher elects to report print and digital versions, total qualified circulation throughout the table shall consist of unduplicated unique recipients.

If non-requested digital circulation is reported, print and digital circulation shall be reported separately throughout the paragraph.

B9.36 Paragraph 3b:

Detailed coding information for each source classification shall be maintained for all qualified circulation.

The following schedule of sources of qualification shall be listed in Paragraph 3b:

- ~~I. Request.....~~
- ~~II. Other Than Request.....~~
- ~~III. Single Copy Sales.....~~

~~The above schedule of sources may be reported in the following detail, at the option of the publisher:~~

- I. Direct Request
- II. Request From Recipient's Company
- III. Membership Benefit
- IV. Communication From Recipient or Recipient's Company
(other than request)
- V. Total sources other than above, ***including: association rosters and directories, business directories, manufacturer's, distributor's and wholesaler's lists, and other sources***
- VI. Single Copy Sales.....

Publishers may report written, telecommunication, and electronic request at their option. ***Publishers may report expanded breakouts of association rosters and directories, business directories, manufacturer's, distributor's and wholesaler's lists separately, at their option.***

B9.43 Paragraph 3c:

Publication members reporting qualified circulation for both print and digital magazines **may report** shall require the analysis separate columns for these circulations which is cross tabulated to the different types of categories reported. Reporting in greater detail, including state/province is at the option of the publisher.

B9.44.4

For circulation in the United Kingdom, **it is sufficient to solely report “United Kingdom”** in paragraph 4. will report the following regional breakout:

Northern	Greater London
Yorkshire & Humberside	South East
North West	South West
East Midlands	Wales
West Midlands	Scotland
East Anglia	Northern Ireland

Publication members reporting circulation within the United Kingdom may elect to do so by county within region using the BPA Worldwide standardized breakout.

Publishers may elect to report circulation in the United Kingdom by region using the following breakout:

Northern	Scotland
Yorkshire & Humberside	Wales
North West	East Anglia
East Midlands	Greater London
West Midlands	South East
Northern Ireland	South West

B9.46

Publication members reporting qualified circulation for digital magazines shall report digital magazines, print publications and **total qualified (unique recipients)** “both print and digital magazines” classification headings. The column representing **unique recipients** “both” shall be **a unduplicated** count. Digital copies shall be reported by country. Reporting in greater detail, including state/province, is at the option of the publisher.

B9.53

If the renewal percentage is reported, the analysis shall **publisher may report a renewal rate for paid subscribers or** state separately the number of qualified paid Individual, Membership Benefit and Multi-Copy Single Addressee subscriptions expiring during the twelve months ended eight months prior to the end of the period covered by the report, the number of these expirations which were renewed, and the renewal percentage.

In addition to the separate reporting required, as an option, a publication may report a combined renewal percentage for Individual and Membership Benefit renewals to include the number of combined subscription expirations and renewals.

B9.60

If paid multi-copy same addressee represents 5% or more of the Average Total Qualified circulation and publications ***elect to*** reporting qualified non-paid and qualified paid circulation separately in paragraphs 2 through 4 ~~and reporting Multi-Copy Single Addressee circulation in paragraph 1 of the circulation statement~~ ***the publisher*** shall report an analysis of that Multi-Copy Single Addressee circulation ***in the explanatory paragraph*** as follows:

"Qualified paid Multi-Copy Single Addressee subscriptions averaging . . . copies were sold, in quantities of to to qualified recipients at prices fromto ~~subscription prices, in quantities of . . . to . . ."~~

B9.66

~~Publications may report non-qualified digital magazines copies that meet the qualification criteria stated in the Field Served and Definition of Recipient Qualification, but have not been requested (personal or company) or served as a benefit of membership, in the explanatory paragraph. Proof of production, distribution and demographic data shall be provided at the time of audit. (See B7.29)~~

B9.68

~~Publications reporting net qualified circulation for digital magazines elsewhere throughout the statement may include a table in the explanatory paragraph detailing the gross number of qualified digital subscribers and qualified print copies existing for each issue. Those recipients receiving both the print and digital magazines, shall be a gross count.~~

B9.69 Method of Distribution

Shall contain one of the following statements concerning the distribution of a publication 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:

Digital Circulation

If digital version circulation exists, the method of distribution shall be fully disclosed as follows:

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

Continuous and Non-Continuous Circulation

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

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

Multi-Copy Same Addressee

If ***multi-copy same addressee circulation of more than two copies to the same addressee of a company is equal to*** 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: (If 25% or more is multi-copy same addressee, see section B9.9.)~~

B9.69 (continued)

"Also qualified are copies shipped in Multi-Copy Single Addressee to companies within the Field Served. A distribution agreement not more than three years old has been obtained indicating that the recipient of the Multi-Copy Single Addressee copies agrees to accept the publication for redistribution to employees of the recipient's company."

~~"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."~~

If multi-copy to the same addressee circulation ***of more than two copies to the same addressee of a company*** ~~of a company circulation~~ is equal to 25% or more of the average qualified distribution, the following comment shall be included in the Definition of Recipient Qualification (page one of the report) and Method of Distribution (last page of the report):

"Also qualified are copies shipped in Multi-Copy Single Addressee to companies within the Field Served. A distribution agreement not more than three years old has been obtained indicating that the recipient of the Multi-Copy Single Addressee copies agrees to accept the publication for redistribution to employees of the recipient's company."

If ~~more than~~ two copies are delivered to the same individual (duplicated copies) and exceeds 25% or more of the average qualified circulation, disclosure in the Definition of Recipient Qualification (page one of the report) and Method of Distribution (last page of the report) shall occur. The following comment shall be stated:

"Also qualified copies are delivered as Multi-Copy Single Addressee within the Definition of Recipient Qualification. These include copies delivered to the same individual appearing on the qualification list more than once."

If 10% or more, but less than 25% of the circulation is of this condition, the appropriate comment from above shall be included under the Method of Distribution, explanatory paragraph and may be reported in the Definition of Recipient Qualification.

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

The Method of Distribution shall be reported in Paragraph 8.

B10.19.2.3

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 B10.19.2.2 above).The personalized data question is required only if the telephone call is not recorded;

B10.19.2.3 (continued)

Contains an acceptable request question with a personalized data question, coupled to the request as defined in Section B10.19.2 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 **When calls are recorded you may confirm** 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.~~

B10.19.3.1

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 **request** transcript that meet 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 B10.19.2.2) 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.

Subscriber access to digital copies may be used to effect a request to continue receiving the digital subscription provided access occurs within the following schedules:

- ***A publication issued on a weekly basis must be accessed nine times during the reporting period.***
- ***A publication issued on a monthly basis must be accessed twice during the reporting period.***
- ***A publication issued on a quarterly basis must be accessed once during a reporting period.***
- ***A semiannual publication must be accessed once per reporting period.***

Publications must maintain proof of initial request and subsequent engagement activity for auditor review.

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.

B10.19.3.1 (continued)

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.

B10.19.5 Request from Recipient's Company: Telecommunication

B10.19.5.1

Telecommunications such as telephone ***interviews with*** ~~calls from~~ authorized individuals ~~at~~ from a company requesting copies of the publication for ***other*** employees of that company may be reported as telecommunication request from recipient's company. ***Such calls may be eligible to be considered as Direct Request: Telecommunication provided they comply with rules B10.19.2.4 and B10.19.2.5.***

Outbound ***solicitations for*** request from recipient's company: telecommunication must be recorded and made available to the auditor at the time of audit.

B10.19.5.3

Publishers electing to use telecommunications for company request shall comply with the following conditions:

Calls shall be recorded, however, if the recipient refuses to be recorded, publisher chooses not to record the call, 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 interviewee and not the publisher is likely to know, may be asked as an alternate should the interviewee not provide an affirmative response to the original question.

Once a particular ***personal identifying*** question is used and the answer is 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 names and titles and/or functions of the employees shall be provided.

The name and title and/or function of the ~~authorized~~ requestor shall be provided along with the company, address, and telephone of the company.

A question of a co-worker approximating the following shall be stated during the telecommunication: "Do you want this publication sent to any other employees? Yes ... No ...

In the case of a requalification effort the co-worker may be asked, "May we continue to send (name of publication) to (name of qualified subscriber)."

"All I need to do is update the address information and ask a few quick questions and we'll be able to continue (name of qualified subscriber's) subscription for another year, ok?"

B10.19.5.3 (continued)

Other options:

Option #1

Do you wish to confirm (name of qualified subscriber) should receive this publication?

Do you wish to confirm that (name of qualified subscriber) should continue to receive this publication?

Option #2

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

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

Option #3

In order for (name of qualified subscriber) to receive a free subscription to (publication name), I just need a few moments to update some information, ok? I have his/her name as...

In order for (name of qualified subscriber) to continue receiving a free subscription to (publication name), I just need a few moments to verify some information, ok? I have his/her 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 (name of qualified subscriber) 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 (name of qualified subscriber) a free subscription to our publication, ok?

Option #5

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

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

~~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.~~

B10.19.5.4

~~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.~~

All other conditions in section B10.19.2 and B10.20.3, except in conditions specified for "direct personal request" telecommunications, shall be followed.



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Targeted – Editorial is changed for specifically defined groups and/or platforms before point of delivery. With a targeted digital magazine, each group of recipients, whether they are segmented demographically or because of the platform they use to receive the digital product, receive a copy with different content specifically selected for that group. Apart from minor updates, the content cannot change once the issue is made available.

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In all audit reports and circulation statements, digital magazines circulation shall be detailed separately **in paragraphs one and two, and may be reported separately** throughout the **balance of the** report. ~~Individuals receiving both the print and digital magazine shall be included only once within Paragraphs 1, 2, 3a, 3b, 4, and paragraph 3c, if reported.~~

~~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, 3, 4, 5, 6.~~

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, C7.25, C9.47, C9.17, C9.18, C9.30, C9.34, C10.4.)

Digital magazines 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 magazines 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~~ **may be reported on the BPA worldwide circulation statements and audit reports as non qualified circulation.**

C7.10 (continued)

Paid digital copies and non-paid digital copies to individuals who meet the qualification criteria stated in the Market Served, may be reported on the BPA worldwide circulation statements, and audit reports. **Recipients who have not requested to receive the publication must first receive an email introducing the digital subscription along with the opportunity to opt out of receiving the publication.**

~~Only one copy of a digital magazine may be considered qualified circulation per single addressee.~~ Digital magazine Site Licenses and Seats (individuals) served as part of the license shall not be reported as qualified circulation. A publisher may disclose the number of digital magazine site licenses and authorized seats, including paid and non-paid data, demographic data, license source and age data, and geographic data, using standard BPA Worldwide tables. 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. Qualified circulation and site license seats may not be summed on the BPA reports.

C7.19.1

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, and 3 of the circulation statement.

"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 C9.47.)

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. If street racks in public spaces are not governed by a municipality or any authority, no permission is required. Rack location, issues and copies per rack, shall be provided to the auditor. This circulation shall be reported separately in paragraphs 3 and 4.

Multi-Copy Same Addressee circulation shall be fully explained in ~~the circulation statement and in paragraphs 3 and the explanatory paragraph through notation.~~ the **explanatory paragraph** explanation which 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. **Refer to rules C7.19.3; C9.17; C9.28; C9.47; C9.54 for other disclosure requirements.**

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.

C7.19.1 (continued)

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 3 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 ~~single one~~ Multi-Copy Same Addressee or Sponsored Multi-Copy Same Addressee sale exceeds 5% of the total **Average Total Qualified circulation** paid subscription claim for the period in which the transaction takes place, the subscriptions involved in that sale shall be separately and fully explained (price, term, nature of subscription) in the explanatory paragraph. Reporting of the actual name of the sponsor/purchaser is optional. **(See rule C9.13)**

For example:

In Explanatory Paragraph: “Distribution includes a paid multi-copy same addressee contract for 1,000 copies or 8.0% of Average Total Qualified purchased by a hotel (option to name hotel) for its guests and visitors paid at an annualized subscription rate of \$20 for 12 issues.”

If the number of subscriptions involved in any single Multi-Copy Same Addressee or Sponsored Multi-Copy Same Addressee sale exceeds 10% of the Average Total Qualified circulation claim for the period, the subscriptions involved in that sale shall be disclosed in the Market Served and fully explained (price, term, nature of subscription) in the explanatory paragraph (see C9.17). Reporting of the actual name of the sponsor/purchaser is optional. (See rule C9.13)

For example:

In Market Served: “Distribution includes a multi-copy same addressee contract with an airline (option to name airline) to passengers for in-lounge and in-flight – see explanatory paragraph.”

In Explanatory Paragraph: “Sponsored multi-copy same addressee copies include a contract with an airline (option to name) for 2000 copies or 16.0% of Average Total Qualified for distribution to passengers in-lounge and in-flight at an annualized subscription rate of \$5 for 12 issues”.

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.)

C7.19.3 (continued)

“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 C9.47.)

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.

When an agent is awarded the right to be the sole distributor of multiple copies to selected franchisee or corporately-owned retail locations, the agent may authorize the distribution agreement. The agreement 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 for each location. Distribution contracts between the agent and each retailer (franchisor or corporate head office) shall be provided to the auditor.

C7.21 Non-Qualified Circulation

That circulation which fails to conform to the terms of the Market Served statement on the front page of the circulation statement and the audit report.

This distribution is reported on the back page of the circulation statement as “Average Non-Qualified Circulation” and includes the following:

Advertiser and Agency Copies, Rotated or Occasional Copies, Copies for Conventions and Trade

Shows (unless claimed as Qualified Circulation), and All Other copies printed, with the exception of Single-Copy Sales returns.

Non-Qualified Circulation shall be reported as an aggregate figure, or, at the option of the publisher, these categories may be reported separately.

Non-qualified copies distributed by the publisher's salespeople to prospects are reported within the explanatory paragraph of the circulation statement as Advertiser and Agency Copies.

Non-qualified copies distributed at trade shows or conventions may be reported as Allocated for Trade Shows and Conventions if adequate distribution documentation is available for audit. Otherwise, these copies are reported as All Other.

~~Digital magazine circulation that meets the qualification criteria stated in the Market Served, but has not been requested (personal or company) or served as a benefit of membership shall may be reported as non-qualified circulation. If reported as non-qualified circulation, evidence of conformance to the Market Served, with proof of production, distribution and any demographic data (no older than 36 months) shall be reported in the Additional Data table at the end of the BPA report. Without the reporting of the conformance, the copies may not be claimed as circulation.~~

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.

C7.24 Public Place

Paid and non-paid copies provided, typically in small quantities per location, by the publisher which are intended to be viewed in waiting rooms, hotels, and other locations, and are not intended to be taken away by consumers. Such copies may be individually addressed or shipped as multi-copies to the same addressee.

Public Place subscriptions may not be reported as paid circulation after the expiration date.

If the number of subscriptions involved in any one Public Place subscription sale exceeds 5% of the **Average Total Qualified Circulation** ~~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 the explanatory paragraph.

For example:

In Explanatory Paragraph: "Distribution includes a paid public place contract for 1,000 copies or 8.0% of Average Total Qualified circulation purchased by a restaurant chain (option to name restaurant chain) for distribution of 5 copies per location to 200 outlets nationwide for its diners to read onsite, paid at an annualized subscription rate of \$5 for 12 issues."

If the copies are purchased and the purchaser 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 and not for the Benefit of the magazine.

Money collected from an agent for Public Place sales 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 sales transaction must be without monetary recourse to the purchaser (sponsor). (See C10.8.)

All Public Place circulation (Sponsored or otherwise) shall be fully explained in the Market Served statement, in Paragraphs 3, and in the Method of Distribution statement in the explanatory paragraph, through notation. The explanation shall provide the details of the character and nature of the Public Place circulation, how it is distributed, price received, if any, and any other amplification necessary.

C7.25 Qualified Circulation

That circulation for which the mailing address conformance to the Market Served, and correct classification in Paragraph 3 are verified by auditable documentary evidence, dated as shown in Paragraph 4 of the circulation statement. (Reporting in Paragraph 4 is required for non-paid circulation and optional for paid circulation.)

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

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 ***throughout the statement*** (see C7.32 Rotated Distribution). ***Non-continuous circulation exceeding 5% for any issue reported in paragraph 2 must be detailed in the explanatory paragraph.***

C7.25 (continued)

~~Individuals receiving copies of a digital version may only be considered as Qualified Circulation if such copies are elicited either through request (direct or company), or as a Benefit-of-Membership subscription. (See C7.7.) Publishers may convert "requested" print edition subscriptions to digital magazine subscriptions provided the subscriber who requested the magazines receives advance notice of the conversion and is given the option to refuse the conversion. The notice of conversion must give the publisher enough time to stop the conversion if the subscriber refuses to convert to a digital subscription. Evidence of the original request and the notice of the conversion shall be available at the time of audit.~~

C9.13

The Price and Frequency summary table shall list the:

"Average Annual Subscription Order Price for the Period Reported (Excluding Sponsored Subscriptions)".

~~If All~~ sponsored orders that represent 5% or more, but less than 10% of all orders for the period, **the "Sponsored Average Annual Order Price"** shall be footnoted in the explanatory paragraph.

If sponsored orders represent 10% or more of all orders for the period, the **average annual order price for the period for sponsored copies shall be reported separately in the price and frequency table on page 1**, "Average Annual Sponsored Order Price for the Period" shall also be reported separately **and detailed** in the explanatory paragraph. ~~and the Price and Frequency table (see Rule 9.49).~~

Magazines with 50,000 or less Average Total Qualified circulation and less than 5% average qualified paid circulation (excluding single copy sales) in paragraph 1, are not required to report average subscription order price. Magazines with more than 50,000 average qualified circulation in paragraph 1, have the same reporting option when the average qualified paid circulation (excluding single copy sales) is less than 2%.

Comic books, reporting multiple editions, may report Average Annual Subscription Price for the period at their option.

C9.17 Paragraph 1 (Average Qualified Circulation Break-Out for Period)

All copies listed in this section must be directed to subscribers or recipients as stated in the Market Served. This paragraph will report: Individual; Benefit-of-Membership; Multi-Copy Same Addressee; Sponsored Individually Addressed; Sponsored Multi-Copy Same Addressee; a sub-total for Subscriptions and Single-Copy Sales; Sponsored Single-Copy Sales; Non-Continuous (if applicable); and a total that is the sum of the numbers shown for all of the break-out lines (not including the Subscriptions/Single-Copy sub-total line).

Separate columns will list qualified paid, qualified non-paid, and qualified continuous (uninterrupted) service, qualified continuous (non- interrupted) and total qualified circulation.

For magazines reporting digital versions, separate paragraph one's shall be included for individuals subscribing to the print version ~~only~~; individuals subscribing to the digital version ~~only~~, **and, if applicable**, individuals receiving both the print and digital versions, **in the explanatory paragraph. Total Qualified circulation shall be the unduplicated count, and shall be reported on page one.** (See C7.10)

If sponsored subscriptions represent 5% - 9.9% of **the Average Total Qualified circulation** ~~all paid subscriptions~~ reported for the period, **the** details of the sponsored subscription (price, term, nature of sponsorship) shall be noted in the explanatory paragraph.

C9.17 (continued)

If sponsored subscriptions represent 10% or more of **the Average Total Qualified circulation** all paid subscriptions reported for the period, **the nature of the** details of the sponsored subscriptions **shall be disclosed in the Market Served and full details** (price, term, nature of sponsorship) shall be noted **in the explanatory paragraph** ~~under paragraph one~~ **with a footnote under Paragraph 1 referencing “See Explanatory Paragraph.”**

If multi-copy same addressee subscriptions represent 5% - 9.9% of **the Average Total Qualified circulation** all paid subscriptions reported for the period, **the** details of the multi-copy same addressee subscriptions (price, term, nature of subscription) shall be noted in the explanatory paragraph.

If multi-copy same addressee subscriptions represent 10% or more of **the Average Total Qualified circulation** all paid subscriptions reported for the period, **the nature of the multi-copy same addressee subscriptions shall be disclosed in the Market Served and** details of the **multi-copy same addressee subscriptions** sponsored subscription (price, term, nature of subscription) **shall be noted in the explanatory paragraph with a footnote under Paragraph 1 referencing “See Explanatory Paragraph.”** ~~Shall be noted under paragraph one.~~

C9.18 Paragraph 2 (Qualified Circulation by Issues for period)

Shall report the Total Qualified Circulation, and separately report Qualified Paid and Qualified Non-Paid for each issue. The paid shall be further reported as Single-Copy Sales and Subscriptions. If Non-Continuous circulation is reported, it shall be reported separately for each issue.

Shall report qualified **gross** print and **gross** digital version circulation separately, **along with the total qualified circulation consisting of unduplicated unique recipients** for each issue. ~~Individuals receiving both the print and digital versions shall be counted only once. If applicable, a separate count of such subscribers shall be included for each issue.~~

C9.30 Paragraph 3a:

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 (**optional**)
Digital Version Only (**optional**)

~~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 C7.10.)~~

If the publisher elects to report print and digital versions, total qualified circulation throughout the table shall consist of unduplicated unique recipients.

C9.34 Paragraph 4:

The initial reporting of Qualified Circulation figures for Paragraph 4 shall be in an audit report. Thereafter, new figures for Paragraph 4 are required at least annually, concurrent with the end of the magazine's audit year.

The new data for Paragraph 4 shall appear in the second circulation statement and in the twelve-month audit report. On the interim circulation statement, qualification figures for paragraph 4 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 available only when the total Qualified Continuous circulation for the issue analyzed in the interim circulation statement is less than 10% above the total Qualified Continuous circulation for the issue analyzed in the latest audit report. If the total qualified circulation for the issue analyzed in the interim circulation statement has increased by 10% or more due to a merger of magazines during the reporting period, the publisher may elect to report actual figures for the interim circulation statement or omit the paragraph for the interim circulation statement. If the publisher chooses to omit the paragraph the following footnote is required, "Due to a merging of magazines during the reporting period paragraph 4 cannot be projected and has not been reported. Paragraph 4 will be reported in the subsequent circulation statement."

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.

A publisher may report new figures in Paragraph 4 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 note the number of non-continuous copies and their sources in the explanatory paragraph. At the publisher's option, a combined summary table may be provided. The percentages in each table should add to 100%.

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

Total Qualified Circulation
% of Total Qualified Circulation
Print Version Only (*optional*)
Digital Version Only (*optional*)
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 chosen by the publisher, as long as the print source is request (Direct Request or Request from Recipient's Company).~~

~~If the print sources something other than Request or Request from Recipient's Company, the electronic source shall be used. (See C7.10.)~~

If non-requested digital circulation is reported, print and digital circulation shall be reported separately throughout the paragraph.

If the publisher elects to report print and digital versions, total qualified circulation throughout the table shall consist of unduplicated unique recipients.

C9.35 Paragraph 4:

The following schedule of sources of qualification shall be listed in paragraph 4:

- ~~I. Request.....~~
- ~~II. Other Than Request.....~~
- ~~III. Single Copy Sales.....~~

~~The above schedule of sources may be reported in the following detail, at the option of the publisher:~~

- I. Direct Request
- II. Request From Recipient's Company
- III. Membership benefit.....
- IV. Communication From Recipient or Redistributors (other than request)..
- V. Total Sources other than above (listed alphabetically) **including rosters and directories, manufacturer, distributor, and wholesaler lists, other source.**

Publishers may report written, telecommunication, and electronic request at their option.

C9.41.7

For circulation in the United Kingdom, **it is sufficient to solely report "United Kingdom" in Paragraph 5. will report the following breakout:**

- | | |
|------------------------|------------------|
| Northern | Greater London |
| Yorkshire & Humberside | South East |
| North West | South West |
| East Midlands | Wales |
| West Midlands | Scotland |
| East Anglia | Northern Ireland |

Publishers may elect to report circulation in the United Kingdom by region using the following breakout:

- | | |
|-----------------------------------|-----------------------|
| Northern | Scotland |
| Yorkshire & Humberside | Wales |
| North West | East Anglia |
| East Midlands | Greater London |
| West Midlands | South East |
| Northern Ireland | South West |

C9.44

Magazine members who distribute to a specific geographically defined area may have the option of including a map to graphically display their circulation distribution.

Shall report the total audited average qualified circulation for a six month circulation intervals for the previous two years and the current unaudited circulation statement(s).

The data shall include a reporting of the Total Audited Average Qualified circulation, Qualified Paid circulation, Total Qualified Non-Paid circulation. Qualified Digital version and Qualified Print Version circulation shall ~~may~~ be reported if applicable. **at publisher's option and if reported shall report gross print and gross digital circulation separately, along with the total qualified circulation consisting of unduplicated unique recipients for each issue.**

C9.47 Method of Distribution (See C9.9)

Method of Distribution shall contain one of the following statements concerning the distribution of a magazines reporting digital magazines, qualified Continuous and Non-Continuous circulation, or multi-copy same addressee circulation:

Digital Magazine

If digital version circulation exists, the Method of Distribution shall be disclosed as follows: (See C7.10)

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

Continuous and Non-Continuous Circulation

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

"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."

Multi-Copy Same Addressee

If **multi-copy same addressee circulation is equal to** 10% or more, but less than 25%, of **the** average qualified circulation ~~is multi-copy same addressee, delivered~~ **and delivery** to the end recipient and cannot be verified, the following comment shall be included in the Method of Distribution (last page of the report).

"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."

If multi-copy to the same addressee circulation is equal to 25% or more of the average qualified ~~circulation distribution~~ **and delivery to the end recipient and cannot be verified**, the following comment shall be included in the Market Served (page one of the report) **describing the nature of the multi copy same addressee circulation and reference the Method of Distribution in the explanatory paragraph.** ~~and Method of Distribution (last page of the report)"~~

"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."

C9.47 (continued)

If ~~more than~~ two copies are delivered to the same individual (duplicated copies) and exceeds 25% or more of the average qualified circulation, **the following** disclosure in the Market Served (page one of the report) and Method of Distribution (~~last page of the report~~) shall occur. The following comment shall be stated:

Also qualified copies are ***duplicated copies served to individuals*** ~~delivered as Multi Copy Single Addressee~~ within the Market Served. These include copies delivered to the same individual appearing on the qualification list more than once.”

If 10% or more, but less than 25% of the circulation is of this condition, the **following comment** ~~appropriate comment from above~~ shall be included under the Method of Distribution: ~~, but not under the market served~~

“Also qualified copies are delivered as Multi-Copy Single Addressee within the Market Served. These include copies delivered to the same individual appearing on the qualification list more than once.”

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

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, or confirmed by show management.”

(See C9.29, C10.17, and C10.20.2.1)

C9.49 Paragraph for Prices

If reported, shall report the “Average Annual Order Price” excluding sponsored orders. (**See C9.13 for guidance**)

Average price shall be calculated by totaling the gross dollar value of all orders received during the reporting period (inclusive of promotional incentives but exclusive of all sponsorship orders, whether Individual, Multi-Copy or Public Place), and dividing this total by the gross total number of copies ordered (exclusive of all Sponsorship orders, whether Individual, Multi-Copy or Public Place). The resulting average unit price is then multiplied by the basic annual term, to yield the average subscription price for the period.

If sponsored orders represent 5% or more, but less than 10% of all orders for the period, the “Sponsored Average Annual Order Price” shall be reported in the explanatory paragraph.

If sponsored orders represent 10% or more of all orders for the period, the average annual order price for the period for sponsored copies shall be reported separately as “Sponsored Average Annual Order Price: \$##.” **on page 1, and reported in the explanatory paragraph.**

Average sponsored order price shall be calculated by totaling the gross dollar value of all sponsored orders received during the reporting period (inclusive of Multi-Copy or Public Place), and dividing this total by the gross total number of sponsored copies ordered. The resulting average unit price is then multiplied by the basic annual term, to yield the average sponsored order price for the period.

C9.49 (continued)

When multiple currencies are collected, the publisher shall convert the multiple currencies into one home currency of choice in order to compute Average Annual Order Price.

(For determining average annual price for Combination Sales, see C7.8.)

If prices paragraph is reported it shall separately report the gross number of Qualified Paid subscriptions sold during the period by prices and terms, in sequence of descending percentage of orders sold that are yielded from offers representing 5% or more of subscription sales for the period (except for "All Others," which shall always be reported last). Sponsored orders are not required to be itemized by price and term. Rather, the total Sponsored orders received during the period (including Multi-Copy and paid Public Place) shall be reported as a one-line figure which, when added to the reporting of all other orders, shall yield the grand total orders received for the period.

If paid copies under "All Others" represent 20% or more of the orders for the period, the average price of "All Other" orders shall also be reported.

Subscriptions sold on a renew until forbid basis with no fixed term, which are billed periodically throughout the year, without any renewal notification, shall be reported separately as "Perpetual subscribers (see note)." The publisher shall disclose the rate and terms of the perpetual subscriptions.

Subscriptions sold on the basis of acceptance of redemption of affinity program points (e.g., frequent flyer miles, loyalty points, etc.) as payment, shall disclose the details of the offer, including the subscription price, redemption value of a point, and points redeemed, in the explanatory paragraph. These shall also be cross-referenced to Prices Paragraph

C9.54

If paid multi-copy same addressee represents 5% or more of the Average Total Qualified circulation and mMagazines electing to report qualified non-paid and qualified paid circulation separately in paragraphs 2 through 5 and ~~reporting multi-copy same addressee circulation in paragraph 4~~ of the circulation statement shall report an analysis of that multi-copy same addressee circulation in the explanatory paragraph as follows:

"Qualified paid multi-copy same addressee subscriptions averaging copies were sold, in quantities of to, to qualified recipients at the following subscription prices: at prices from to....."

C9.59

Average Non-Qualified Circulation

This distribution shall be reported as a total figure and includes the distribution for the period of the following:

Advertiser and Agency Copies;

~~Non-Qualified Digital Magazines;~~

Non-Qualified Paid;

Rotated or Occasional Copies;

Copies for Conventions and Trade Shows, (if NOT reported as qualified);

and all other copies printed with the exception of single copy sales returns.

C9.59 (continued)

At the option of the publisher, these categories may be reported separately.

If single copy sales are reported, the following comment must be included, "Average non-qualified circulation excludes single copy sale returns."

Digital non-qualified advertiser and advertiser agency copies, ~~non-qualified paid digital copies (excluding sponsored), and non-qualified non-paid digital copies that meet the qualification criteria stated in the Field Served and Definition of Recipient Qualification but have not been requested~~ may be reported in the non-qualified average on the BPA worldwide circulation statements, and audit reports.

C9.62

~~Magazines reporting the required net qualified circulation for digital versions may include a table detailing the gross number of qualified electronic subscribers and qualified print copies existed for each issue. Those recipients receiving both the print and digital versions, shall be a gross count. This data shall appear in the explanatory paragraph.~~

C9.64

~~Publications may report non-qualified digital magazine copies that meet the qualification criteria stated in the Market Served, but have not been requested (personal or company) or served as a benefit of membership, in the explanatory paragraph. Proof of production, distribution and any demographic data (no older than 36 months) shall be provided at the time of audit. (See C7.21)~~

C10.19.2.3

~~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 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 C10.19.2.2 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 re-corded by the receiver, signed and dated.~~

~~With the exception **When calls are recorded you may confirm**, 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.~~

C10.19.3.1

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 **request** transcripts that meet 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 C10.19.2.2) 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.

Subscriber access to digital copies may be used to substantiate a subscriber request to continue receiving the digital subscription. Subscriber access within the following schedules will qualify as a request to continue to receive the publication:

- ***A publication issued on a weekly basis must be accessed nine times during the reporting period.***
- ***A publication issued on a monthly basis must be accessed twice during the reporting period.***
- ***A publication issued on a quarterly basis must be accessed once during a reporting period.***
- ***A semiannual publication must be accessed once per reporting period.***

Publications must maintain proof of initial request and subsequent engagement activity for auditor review.

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.

C10.19.5 Request from Recipient's Company: Telecommunication

C10.19.5.1

Telecommunications such as telephone calls from ~~authorized~~ individuals ~~at~~ from a company requesting copies of the magazine for **other** employees of that company may be reported as telecommunication request from recipient's company.

C10.19.5.1 (continued)

Such calls may be eligible to be considered as Direct Request: Telecommunication provided they comply with rules C10.19.2.4 and C10.19.2.5.

Outbound solicitations for request from recipient's company: telecommunication must be recorded and made available to the auditor at the time of the audit.

C10.19.5.2

Publishers electing to use telecommunications for company request shall comply with the following conditions:

Calls shall be recorded, however, if recipient refuses to be recorded, a personal identifying question must be asked and answered. A question approximating the following shall be asked and answered during the telecommunication: "Please send this publication to the following employees," or "Do you want this magazine sent to any other employees? Yes ... No ... 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 interviewee and not the publisher is likely to know, may be asked as an alternate should the interviewee not provide an affirmative response to the original question.

Once a particular ***personal identifying*** question is used and the answer is 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 names and titles and/or functions of the employees shall be provided:

The name and title and/or function of the ~~authorized~~ requestor shall be provided along with the company, address, and telephone of the company.

A question of a co-worker approximating the following shall be stated during the telecommunication: "Do you want this publication sent to any other employees? Yes ... No ...

In the case of a requalification effort the co-worker may be asked, "May we continue to send (name of publication) to (name of qualified subscriber)."

"All I need to do is update the address information and ask a few quick questions and we'll be able to continue (name of qualified subscriber's) subscription for another year, ok?"

Other options:

Option #1

Do you wish to confirm (name of qualified subscriber) should receive this publication?

Do you wish to confirm that (name of qualified subscriber) should continue to receive this publication?

C10.19.5.2 (continued)

Option #2

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

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

Option #3

In order for (name of qualified subscriber) to receive a free subscription to (publication name), I just need a few moments to update some information, ok? I have his/her name as...

In order for (name of qualified subscriber) to continue receiving a free subscription to (publication name), I just need a few moments to verify some information, ok? I have his/her 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 (name of qualified subscriber) 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 (name of qualified subscriber) a free subscription to our publication, ok?

Option #5

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

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



BULLETIN N 11-1

December 2011

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

N2.7

Industry service providers, companies or individuals, applying for associate membership shall qualify as stated in Section B2.0 of the Bylaws and shall conform to the following requirements:

N2.7.1

Provide the names and contact details of three professional references that can attest to the applicants successful completion of BPA Worldwide related projects. It is allowable to provide one reference if a minimum of three projects were completed.

N2.7.2

Associate members who maintain successful ongoing completion of BPA projects are permitted to renew their membership on an annual basis.

N2.7.3

Reviews of performance will be completed for any associate member's work that negatively impacts BPA members or the industry. Those associate members who are found to be negatively impacting BPA members or the industry will be reviewed under Section 10 of the Bylaws (offences and penalties).

N3.10 Combined Sales

Subscriptions to multiple newspapers (***including multiple platforms of one newspaper, i.e. print, and/or digital for computer, tablet, mobile, restricted access website, etc***) or newspapers and products/services sold together at a special rate, including charitable donations combined with non-deductible subscriptions.

Comment shall be made in paragraph 7 providing details of the number of copies of each newspaper sold in combination with another newspaper/product/service.

A publisher may disclose the price of each item of the combination sale or simply the value of the newspaper subscription. If this option is chosen, the disclosed value of the newspaper subscription shall be the price reported. The disclosed value cannot equal or exceed the total price to be paid for the entire package offered.

In the absence of individual item or newspaper price disclosures, the value of the subscription will be calculated as follows:

N3.10 (continued)

In order to determine the value of the subscription you shall first sum the recognized retail value (base value) of all the individual elements of the combination offer. The ratio of the bundled offer price to the sum of the individual elements determines the discount rate.

Example **multiple products** offer:

12-issue **3 month** subscription to XYZ (base rate \$20.00)
1 widget (base value \$15.00)
3 Months Risk Free access to a Web site (base value \$25.00)
Combination Rate: \$25.00

Calculation: $\$20.00 + \$15.00 + \$25.00 = \60.00
Offer: $\$25.00 / \$60.00 = 41.6\%$
Discounted Newspaper Price: $.416 \times \$20.00 = \8.33

Example **multiple platform** offer:

3 month subscription to XYZ print version (base rate \$20.00)
3 month subscription to XYZ digital tablet version (base rate \$15.00)
3 month subscription to XYZ restricted access website (base Rate \$10.00)
Combination rate: \$30.00

Calculation: $\$20.00 + \$15.00 + \$10.00 = \45.00
Offer: $\$30.00 / \$45.00 = 66.6\%$
Discount Price for each: Print \$13.33 ($\$20.00 \times .66$); Tablet \$9.99 ($\$15.00 \times .66$); Website \$6.66 ($\$10.00 \times .66$)

N3.13 Electronic Editions (E-editions)

Electronic Editions – A newspaper (either with a companion print version or as a stand alone electronic product) delivered periodically in a digital format with metered (i.e. linear) navigation, that is edited, designed, and contains date-stamped content that includes advertising (but not necessarily the same advertising as might appear in a print version). Though editing, design, and issue identification (i.e. date-stamped content) are significant differences, the primary distinction between an electronic editions and a website is the metering (this can be pagination or any other method of going through the issue from beginning to end).

An electronic edition may be dynamically created, have targeted content, or may exist in parallel with pre-existing media.

Dynamic – Editorial can be created and/or selected at point of delivery. With a dynamic electronic edition, each recipient can receive a copy with different content and that content can change at any time.

Targeted – Editorial is changed for specifically defined groups and/or platforms before point of delivery. With a targeted electronic edition, each group of recipients, whether they are segmented demographically or because of the platform they use to receive the electronic product, receive a copy with different content specifically selected for that group. Apart from minor updates, the content cannot change once the issue is made available.

Replica Plus Enhanced— If a print brand existed first, “plus” is editorial that is retained from the original edition and is redesigned and/or supplemented. With an enhanced electronic product, each issue’s content is primarily taken (but not necessarily replicated in its entirety) from the original edition (whether in print or electronic). Apart from minor updates, the content cannot change once the issue is made available.

N3.13 (continued)

Editorial Replica and Enhanced editions shall be reported as “Replica” on circulation reports. All others shall be reported as “Non-Replica.” Replica and non-replica editions may be further reported by replica, replica plus, targeted, and dynamic editions. Publishers may also report by all of the above by platform (computer, tablet, mobile, restricted access, website, etc). (See Rule 9.10)

Publishers shall report in paragraph one the gross circulation by channel (replica and non-replica) and the number of unique unduplicated subscribers.

Publishers shall disclose in circulation statements under a “Statement of Content Platform” the form or combination of forms of electronic editions used per the above definition/ description.

Circulation for electronic editions shall be audited to ensure 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 electronic edition. The printing and release of an audit shall be at the media owners option.

~~The electronic circulation shall be detailed separately throughout the report. Individuals receiving print, electronic, and both the print and electronic versions shall be included only once within paragraphs 1, 3, 4, 5 and 10. A table may be reported in Paragraph 10 which details the gross copy count for both the print and electronic editions.~~

Non-qualified electronic edition copies shall not be reported on BPA Worldwide circulation statements and audit reports.

Electronic Edition Site License: A contract or agreement between a publisher member and company/organization/association/educational establishment to provide multiple individuals access to an electronic edition of the newspaper. The contract/agreement shall require the subscriber/administrator of the site license to notify all the individual seats (individuals) of the availability of each issue. Licenses may be reported for definitive amount of seats only, “global” or “companywide” license agreements may not be reported.

Paid site licenses shall adhere to rule N3.33, qualified paid circulation.

Non-paid site licenses shall adhere to qualified non-paid circulation rule N3.32.

The publisher shall disclose in the explanatory paragraph the number of authorized Electronic Edition Site Licenses and Seats (individuals) served as part of the license, including paid and non-paid data. 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.

Newspaper members with a daily frequency shall report the paid order as qualified circulation for the subscription period purchased. Email alerts are not required.

Newspaper members may report at their option whether subscribers to the electronic edition receive an email alert only, or have downloaded/retrieved/received the electronic edition.

If email alerts are reported, such data shall be reported in paragraphs 1, 3, 4, and 5. If an alert or notification is sent to a subscriber indicating the electronic copy is available for download 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.

If issue downloaded/retrieved/received data is reported, such data shall be reported in paragraphs 1, 3, 4, and 5.

N3.13 (continued)

A downloaded/retrieved/received issue may be reported as long as the issue was downloaded/retrieved/received within 60 days of the alert. At the time of Circulation Statement filing, any issues for which final downloaded, retrieved, received counts are not available may be estimated based on a historical average. At the time of audit the estimation will be compared to actual data. If the variance is material, an Audit Report will be issued to adjust the circulation accordingly.

N3.21 HYBRID SUBSCRIPTIONS

A combination of print and digital editions with the intent to count only one copy as circulation per day. For example, a subscriber receives a print copy Monday-Friday and digital copies Saturday and Sunday. The Monday-Friday copies shall be reported as print editions, the Saturday and Sunday copies shall be reported as digital editions. Only one copy is reported per day.

N3.38 Sponsored/Third-Party Circulation

N3.38.1 Circulation which promotes the interests of the sponsor/donor and which otherwise conforms to the definition of qualified paid circulation shall be reported in Paragraphs 1, 3, 5, and 9. This includes carrier, mail, electronic, bulk and single-copy sales. ***Each sponsorship/third-party sale transaction must be without monetary recourse to the purchaser.***

Sponsored/Third-Party circulation sold with advertising shall meet the following criteria:

The advertising agreement and newspaper purchase agreement are shown on separate contracts; or

The advertising agreement includes specific language disclosing the newspaper purchase price within the contract when the agreement includes both advertising and newspapers; or

The purchase price of the newspaper is a separate itemized line within the contract or invoice when the agreement includes both advertising and the newspaper.

The purchase transaction must be separate from any other financial agreement between the third party purchaser and the newspaper.

Recipients must be advised that the copies are made available by the purchaser.

Recipients must receive initial notification that includes all information necessary to cancel delivery.

A clear audit trail must be maintained from the invoice/contract to the circulation records.

N5.8 Paragraph 1: Average Circulation for Period

All copies listed in this Section are directed to subscribers or recipients as stated in the "Statement of Publishing and Circulation Policy."

Non-Paid Newspapers shall include:

TOTAL AVERAGE CIRCULATION	
Total Non-Paid Circulation	
Circulation Channels	
A)	Individuals.....
B)	Public place distribution at retail, public, and private locations.....
C)	Boxes.....
TOTAL CIRCULATION	

Paid Newspapers shall include:

1. AVERAGE CIRCULATION FOR THE 6 MONTH PERIOD ENDING JUNE 2009		
	Daily (Monday - Saturday)	Sunday
TOTAL CIRCULATION		
I. Paid Circulation		
Subscriptions:		
Carrier _____		
Mail _____		
Bulk _____		
Total Subscriptions _____		
Single Copy Sales _____		
Newspapers in Education _____		
Employee Copies _____		
Sub-Total		
II. Paid Sponsored/Third Party Subscriptions		
Subscriptions:		
Carrier _____		
Mail _____		
Bulk _____		
Total Subscriptions _____		
Single Copy Sales _____		
Newspapers in Education _____		
Sub-Total		
Total Paid Circulation		
III. TOTAL NON-PAID CIRCULATION		
Individual		
1) Carrier delivery _____		
2) Mail delivery _____		
Bulk Distribution _____		
Total Non-Paid		
TOTAL QUALIFIED CIRCULATION		

The average circulation of separate issues (or groupings of issues) can be reported in columnar format at the option of the publisher.

N5.8 (continued)

Publishers reporting multiple platforms (print, digital for computers, tablets, mobile, restricted access websites, etc) may use the following tables:

1. EXECUTIVE SUMMARY					
	Print	Digital Replica	Digital Non-Replica	Gross Total	Net Unique Recipients
Total Average Paid					
Individual _____					
Multi-Copy _____					
Single Copy Sales _____					
Subtotal					
Total Paid Sponsored/Third Party					
Individual _____					
Multi-Copy _____					
Single Copy Sales _____					
Subtotal					
Total Paid					
Total Average Non-Paid					
Individual _____					
Multi-Copy _____					
Single Copy Sales _____					
Total Non-Paid					
Total					

1a. AVERAGE FOR THE 6 MONTH PERIOD ENDED MONTH YEAR						
	Paid	Paid Sponsored/Third Party	Total Paid	Non-Paid	Gross Total	Net Unique Recipients
Subscriptions:						
Individual (Print) _____						
Individual (Digital) _____						
Editorial Replica Edition _____						
Replica Plus Edition _____						
Subtotal Replica Edition						
Targeted Edition _____						
Dynamic Edition _____						
Subtotal Non-Replica Edition						
Multi-Copy (Print) _____						
Multi-Copy (Digital) _____						
Editorial Replica Edition _____						
Replica Plus Edition _____						
Subtotal Replica Edition						
Targeted Edition _____						
Dynamic Edition _____						
Subtotal Non-Replica Edition						
Subtotal						
Single Copy Sales (Print) _____						
Single Copy Sales (Digital) _____						
Editorial Replica Edition _____						
Replica Plus Edition _____						
Subtotal Replica Edition						
Targeted Edition _____						
Dynamic Edition _____						
Subtotal Non-Replica Edition						
Subtotal						
Gross Total						

N5.8 (continued)

Digital editions shall be reported as replica and non-replica. Replica and non-replica editions shall be broken out further into: replica, replica plus, targeted, and dynamic editions. Publishers may also report replica, enhanced, targeted and dynamic by platform (computer, tablet, mobile, restricted access website, etc).



BULLETIN DN 11-1

December 2011

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

Canadian-DN2.9

Industry service providers, companies or individuals, applying for associate membership shall qualify as stated in Section B2.0 of the Bylaws and shall conform to the following requirements:

Canadian DN2.9.1

Provide the names and contact details of three professional references that can attest to the applicants successful completion of BPA Worldwide related projects. It is allowable to provide one reference if a minimum of three projects were completed.

Canadian DN2.9.2

Associate members who maintain successful ongoing completion of BPA projects are permitted to renew their membership on an annual basis.

Canadian DN2.9.3

Reviews of performance will be completed for any associate member's work that negatively impacts BPA members or the industry. Those associate members who are found to be negatively impacting BPA members or the industry will be reviewed under Section 10 of the Bylaws (offences and penalties).

Canadian DN3.21 HYBRID SUBSCRIPTIONS

A combination of print and digital editions with the intent to count only one copy as circulation per day. For example, a subscriber receives a print copy Monday-Friday and digital copies Saturday and Sunday. The Monday-Friday copies shall be reported as print editions, the Saturday and Sunday copies shall be reported as digital editions. Only one copy is reported per day.

Canadian-DN7.9 Combined Sales

Subscriptions to multiple newspapers (***including multiple platforms of one newspaper***) or newspapers and products or services sold at a special rate. (***See rule DN7.13***)

Comment shall be made in paragraph 6 providing details of the number of copies of each newspaper sold in combination with another newspaper/product/service.

A publisher may disclose the price of each item of the combination sale or simply the value of the newspaper subscription. If this option is chosen, the disclosed value of the newspaper subscription shall be the price used. The disclosed value cannot be in excess of the total price to be paid for the entire package offered.

In the absence of individual item or newspaper price disclosures, the value of the subscription will be calculated as follows:

In order to determine the value of the subscription you shall first sum the recognized retail value (base value) of all the individual elements of the combination offer. The ratio of the bundled offer price to the sum of the individual elements determines the discount rate.

Example **multiple products** offer:

~~12 issue~~ **3 month** subscription to XYZ (base rate \$20.00)
1 widget (base value \$15.00)
3 Months Risk Free access to a Web site (base value \$25.00)
Combination Rate: \$25.00

Calculation: $\$20.00 + \$15.00 + \$25.00 = \60.00
Offer: $\$25.00 / \$60.00 = 41.6\%$
Discounted Newspaper Price: $.416 \times \$20.00 = \8.33

Example **multiple platform** offer:

3 month subscription to XYZ print version (base rate \$20.00)
3 month subscription to XYZ digital tablet version (base rate \$15.00)
3 month subscription to XYZ restricted access website (base Rate \$10.00)
Combination rate: \$30.00

Calculation: $\$20.00 + \$15.00 + \$10.00 = \45.00
Offer: $\$30.00 / \$45.00 = 66.6\%$
Discount Price for each: Print \$13.33 ($\$20.00 \times .66$); Tablet \$9.99 ($\$15.00 \times .66$); Website \$6.66 ($\$10.00 \times .66$)