

Newsletter



Chapter Leadership Handbook

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Advancing Productivity, Innovation, and Competitive Success

NEWSLETTER

CHAPTER LEADERSHIP HANDBOOK

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Foreword

As hours of meticulous work and panicked rushes to meet deadlines may have taught you, achieving positive, professional communication is not as easy as it sounds. That's what the *APICS Chapter Newsletter Guide* is all about. This step-by-step guide—developed by the APICS Communications Division—takes you through newsletter production from start to finish.

In ***Setting the Foundation***, you will read material that can help you rethink your newsletter and establish a standard framework for all issues, as well as suggestions for selecting hardware and software to assist you in producing your newsletter. In ***Issue Planning***, you will gain new ideas for enhancing your newsletter, news on information retrieval, and a system for planning the general layout. ***Writing and Editing*** provides tips on effective writing, proofreading, and style. In ***Design and Production***, you will find basic design principles, methods for overhauling your look, and ideas for using art, photos, and graphics. Finally, ***Printing and Mailing*** will teach you about working with printers and identifying mailing and distribution options. The ***Appendices*** include a checklist to assist you in evaluating your newsletter, a list of further readings, and a glossary of terms.

The experience levels of APICS newsletter editors vary widely, and your situation may not at times fit those described in the guide. This guide assumes that you have some knowledge of newsletter production. The glossary of terms in the Appendix provides a quick reference, and the list of readings provides sources for additional information.

Many editors are using computers to produce their publications. This guide will give you a background in traditional newsletter production concepts and help you better use computers to produce your pieces. The basic concepts haven't changed only the tools have. This guide will give you enough information to make computers serve you, but not master you.

Those of you producing newsletters on a shoestring budget may wonder how these ideas can work for you. Tips you can implement to cut costs are preceded by a  graphic.

Good communication works. Share your newsletters with other chapters. Share your ideas. Share your successes.

Setting the Foundation

Although writing articles, editing the news, determining layout, and seeing your newsletter through to press are an editor's most urgent issues, establishing a solid foundation for your newsletter is crucial. If you have thought about the purpose, goals, and administration of your newsletter ahead of time, the results will be evident in a unified, professional product.

Ask "Why?" Why does your newsletter exist? *To generate membership? To be a reference? To serve as a marketing or advertising vehicle or to provide a source of quick information?* Which functions should the newsletter perform? The decision is up to the newsletter editor and fellow chapter officers.

Although you want to appeal to all facets of the chapter membership, you will need to establish a consistent, professional style and image for the newsletter. Looking at the APICS Statement of Purpose for Chapter Newsletters at the end of this guide is a good starting point.

Create Policy. If you accept stories from others, how will you receive them? Should they be typed? Should they be on CD? In what format? If you share responsibility for newsletter contents with other members, what are the deadlines? All these questions need consistent editorial policies established at the onset.

One policy issue of particular concern for many newsletter editors is whether to carry advertising. Advertising can make your newsletter financially self-sufficient. On the other hand, it may cause readers to discount the newsletter's sincerity and cause the chapter to be liable for the unrelated business income tax (see information on page 15). Again, set a policy.

Be Aware of the Budget. Be certain that your chapter budget allows for enough money to produce and distribute the newsletter. The budget will affect almost all facets of your newsletter process. How many issues can you produce within the budget? How long can your newsletter be? Will the newsletter be printed or photocopied? What type of paper will you use? Can you use more than one color of ink? Can you afford outside design, desktop publishing, or mailing services? Can you afford to use first-class postage for the newsletter?

Set Goals. Give yourself room to grow by setting editorial goals for yourself. These goals should be measurable and achievable. Perhaps during the next year you will want to expand the mailing list by 40 people, enlist two writers, or get on the mailing lists of other chapters in your region. Whatever your goals, they should spring from your newsletter's purpose, your readers' needs, and your chapter's goals.

Defining Your Newsletter

You can identify the purpose and goals of your newsletter by filling out the following worksheet.

Name of publication _____ **Frequency** _____

Audience (Audience should include both your primary readership and your secondhand or "pass-along" readers, such as your members' coworkers, who may spot the publication on their desks and want to join.)

Audience characteristics (Define audience needs and likes. Research may be necessary.)

Long-term chapter objectives (These may help you establish departments within the newsletter. Take them from readers' needs.)

Statement of purpose (create one concise sentence that sums up your newsletters purpose)

Publication's image (Corporate, academic, traditional, casual, etc.—image determines all aspects of your publication, from the design or "look" to the writing style.)

Scheduling

Once you have defined the purpose, goals, and character of your newsletter, you can begin scheduling.

You must decide on the frequency of the newsletter. It is important to publish the newsletter regularly. It should be published often enough that the material in the newsletter is still news and serves as a timely reminder of chapter events. Members should receive the newsletter at least a week before the first date shown on the calendar of events.

You can use the work sheet below to set a schedule in the following way:

- Use it to plan. Start with the date on which distribution should be complete. Using a calendar, count backward for each stage of production. (Count only working days.) In doing so, remember that production and mailing lags may occur.
- The amount of time budgeted for each activity depends on your newsletter goals and your specific situation. For example, if you develop a simple and fast method for typesetting and layout, you might be able to spend a few extra days on planning.
- Keep completion dates ("actual dates") beside target due dates for reference in planning. Complete a few production schedules, recording how much time it takes to complete each step. Then review the schedule for problem spots and make changes accordingly.

STAGE	TARGET DATE	ACTUAL DATE	COMMENTS
Planning			
Story assignments/ideas complete			
Story drafts complete			
Stories edited			
Stories proofread			
Newsletter layout complete			
Review of blueline (if any)			
Printing complete			
Distribution (mailing) complete			

Considering Outside Services

As you plan, consider all options. Although using the following suppliers will mean added expenses, they may provide what you need:

Design Agencies, Services, and Freelancers—These options are relatively expensive, but you might want to consider a freelancer for the design of your nameplate (the title on the first page of your newsletter; some people may mistakenly call it a masthead) or for providing an overall design concept for your newsletter.

Commercial Newsletter Publishers—Commercial newsletters exist to make money for their publishers but may provide a benefit to your chapter as well. The publisher provides some of the articles and fits your section of information into a generic publication. You distribute the newsletter to your chapter. The publisher sets deadlines and sells advertising to cover publication costs, often with advertising leads and input from the client.

Note: Arrangements with publishers differ. Take time to negotiate an acceptable contractual relationship and have it reviewed by legal counsel before signing.

Computer Capabilities—If you have used desktop - publishing software to lay out your newsletter exactly as you want it, most printers can take your file directly. Another option, possible even with word - processing software, is for you to provide your printer with camera-ready copy.

Desktop Publishing Services—These shops produce camera-ready copy either from your typed manuscript or from your electronic files. Many also offer design services. APICS chapters are increasingly using these publishing services.

Full-Service Printers—Many printers have it all—from designers to printing capabilities to mailing services. If you use more than one service, consider streamlining your operations by using one agency. While using one agency may be more expensive, the hassle-free production may be worth it.

Mailing Houses—Mailing houses can address and mail your chapter newsletter. Printers often can handle small mailings for you or can recommend mailing houses.

Selecting or Upgrading Hardware and Software

Several factors must be considered when deciding whether to select or upgrade your computer software:

- **What are your current needs?** If you plan to produce a simple one-, two-, or three-column newsletter with only a few graphic elements, you might need only a computer, a printer, and a word - processing package. If, on the other hand, you want a system that can scan photos and artwork, prepare color separations, and create flexible, multicolumn layouts, you may need a top-of-the-line system that includes a variety of software packages.
- **Are you using what you already have to the best of its ability?**
 - If you are using a typewriter, clip art, and press-on headlines, for example, are you hoping that a computer system will work design miracles? If you already have a software system, can you use all the features that could help you produce a better looking newsletter? It is more cost-effective and time-efficient to make the most of your current system rather than to purchase a new system and spend time learning to use it effectively.
- **What do you hope the new system will add to your layouts or the process of newsletter development?** Verify that your expectations are realistic. If you want the new system merely to show that you can use up-to-date technology, it is unnecessary. If, however, you need the ability to scan photos, for example, you probably need to upgrade the system. A new system may also streamline your newsletter publication process.
- **Does your current system meet your chapter's current or anticipated needs?** If it does, the system is still appropriate for your chapter. Computer systems are continually being updated; wait until your system does not meet your needs before you upgrade.
- **How much money do you have?** The ideal system might include the newest, largest, fastest computer, a laser printer, a large monitor, a scanner, a word-processing program, a page - layout program, a graphics program, a photo-manipulation program, and a type-management program. However, such a package would cost a lot of money and take a lot of time to learn. Will any savings from streamlining your processes be offset by the cost of the system?
- **How much time can you spend learning the new system?** Very few software packages are intuitively obvious. Even after you can design and produce an acceptable newsletter with your software package, you will still be learning new features. If you are not currently using any computer software, it will take you longer to learn how to use a system than if you are already familiar with a page - layout program. If you are just beginning to use a computer system, you should probably purchase a word - processing package that can be used to produce a

good-looking, two- or three-column newsletter with a limited number of imported graphics.

- **What hardware and software support is available?** Although the vendor who sells you your computer system and the software manufacturer can provide support, consider the programs that your coworkers and friends use. It is often easier to ask simple questions of someone who can provide answers from a hands-on, user's perspective. When the person who uses the system cannot answer a question, call technical support.
- **Is the system user-friendly?** Ask friends and coworkers who use the software whether it is prone to crashes. Is it fairly easy to learn? What is the system speed? Will it take an incredibly long time to print a document or to refresh the screen?
- **Does the system you are considering meet your current and future needs?** If it does not, you might want to wait until you can afford a system that meets your needs. It is frustrating to use an unacceptably slow system that does not do what you want it to do while you wait until you can upgrade the system.

Issue Planning

The best newsletters have a clear content focused and valuable information, which establishes trust among the readership. Because readers are busy people, the newsletters are short and personal. Most important, they are timely. Readers know they can rely on getting up-to-date information quickly and easily. How do these newsletters do it? Through careful planning. To assist you with planning, the appendix contains a section entitled "What Makes a *Good* Newsletter?" It provides a checklist that can help you improve planning your newsletter.

Gathering Information

After the logistical foundation for your newsletter is set, it is time to get down to the business at hand—gathering and organizing information for the current issue of the newsletter.

Quality newsletters are based on quality news or feature articles, but this information has to come from somewhere. Depending on your situation, there are many ways to gather the information you need.

One method is to use an editorial formula to determine what information to gather. This formula should be in accord with the purpose statement of the newsletter. You may decide, for example, that you will allot space in the following way:

- 30% to meeting information and upcoming events
- 30% to industry topics and trends
- 20% to educational issues
- 10% to the president's message and calendar section
- 10% to personality profiles of members

To further define your editorial formula and to make sure you include the most current information possible, consider holding story meetings or newsletter planning meetings, either at board meetings or with a small group of members. Use the meetings to brainstorm ideas and ensure that the focus of the newsletter reflects the current focus of your local chapter. Newsletter planning meetings are particularly effective in larger chapters, which may have publicity or newsletter committees.

Another option is to have several reliable chapter members act as reporters. They can keep their ears open for APICS-related news and write an article or two per issue. Assigning articles to chapter members can spare you hours of writing time—at the same time, it ensures that a variety of articles and viewpoints appear. You will, however, need to spend time briefing chapter members about how to prepare their writing, such as giving them file requirements or asking for typed copy.

If your newsletter is fairly small and you are the only writer, establish an editor-reader relationship so that your readers start relaying news directly to you. Be approachable at dinner meetings, and make sure your name, address, e-mail address, phone numbers, and frequency of newsletter publication are highlighted in your newsletter to encourage readers to contact you with story ideas. (A list of officers on the front or back page is not enough to solicit this input unless it specifies the name of the newsletter editor.)

Other ways to develop story ideas are by checking other publications, reprinting (with permission) articles from other APICS publications, and placing questions on your member needs survey to determine your readers' interests and needs. As you accumulate ideas, keep an idea folder or list to prevent them from slipping away.

APICS provides electronic copies of advertisements and other material in the Volunteer Resources Section of the Web site.

When you are collecting ideas, do not neglect art and photos. You need to plan from the beginning to have these and be able to assign responsibility for them, if necessary.

APICS grants permission for reprinting, photocopying, or otherwise responsibility for reusing wise most of its copyrighted publications by APICS. In all cases, a written request must be submitted to the Permissions/Communications Division at APICS Headquarters before permission is granted. Permission is granted to the requestor in writing. The proper credit line must be used and will be provided when permission for use is granted. Publications for which APICS does not grant permission include certification courseware and other certification materials.

Brainstorming for Story Ideas

Experts advise against including past events or long write-ups of past meetings. They say keep the chapter presidents' messages short. Inside jokes or cutesy photos have little place in professional newsletters. How then, do you fill a newsletter? Below are some suggestions.

Ask the Expert—if you have a great resident expert. A column for member questions on highly technical issues.

Awards—Competitions or awards in the field, including who won and how to apply.

The Bottom Line—Your most important values or interests.

Certification News—Current information about upcoming certification dates, changing requirements, or broad issues in certification.

Customers—Who they are, how to please them. How to best discover and meet their needs and interests.

Employee Relations—Establishing direct, personal communications. Handling touchy issues. Giving clear instruction and feedback. Aiding in goal setting.

Ethics—Potential conflicts of loyalty. Conflicts between quality and efficiency. Situations in which members have had to make ethics decisions and how they solved these dilemmas.

How To—How to recruit new members. How to beat the clock on a tight project. How to convince a supervisor of APICS' benefits. How to prepare yourself for crisis situations.

Industry Trends—Current issues affecting the workplace, such as the changing demographics of the workforce or the pressure of international competition. Economic, political, and societal trends. How they will change the way members work.

Interviews—Interviews highlighting interesting people in the chapter, coworkers, or colleagues.

Legislation—Laws or proposals that will affect the way your audience or the industry does business.

Networking/Job Opportunities—A job bank column listing job openings and brief resumes. Or a how-to column on getting jobs or forging a career path.

New Technology—Materials, electronics, and computer systems that will affect business in the future. Implementing technology quickly and to the most benefit. Ways computers and new technologies are used in industry.

Personality Profiles—An article about a member who has made outstanding efforts or important contributions to the field.

Question-and-Answer (Q&A) Columns—Any topic, or different topics from issue to issue.

Quality—Defining quality. TQM. Profiles of what members and their companies are doing in the way of quality control. Innovative systems for setting and following requirements.

References/Resources—Information on or reviews of publications that contain crucial industry information. What to buy and preview. Articles about local resources applicable to operations management.

Review/Evaluation—Evaluating products and customers. Evaluating work systems. Reviewing employees, training, or consultants.

Resource Reviews—Evaluations of useful publications in the *APICS Educational Materials Catalog*.

Suppliers—Getting the most from them. Forging partnerships. Discovering who sells or provides what products and services.

Terminology—List of language terms and definitions specific to your industry or to the APICS body of knowledge.

Once you have brainstormed, rely on the knowledge of fellow APICS volunteers—many of whom are specialists—to produce the information you need. If no one in your local chapter is a specialist in what you want to print, look further.

Regular columns and departments in the newsletter might include

- **a calendar of events** column to keep chapter members aware of local and APICS events (the calendar should also include newsletter deadlines).
- **book reviews** to alert members to resources and new publications
- **relevant APICS news**

You can also establish a **filler file** to fill gaps in the newsletter. You might include short book reviews, clip art or line art (do not use cartoons unless you have written permission to reprint them), or industry-specific training tips or advice. Although the purpose of filler is just to fill the space in the newsletter, undated filler material can prevent scrambling around at the last minute to find information to put into a three-inch blank space. The *Leadership Central* newsletter and the Volunteer Resources Section of the Web site often include information about available resources, advertisements for APICS events, and other filler material.

Pulling the Components Together

One of the quickest ways to examine the overall plan of your newsletter is to use small replications of pages that enable you to place and see all contents page by page. These planning pages, sometimes called thumbnails, ensure that you have included room for crucial pieces and for standard elements help you evaluate your balance of news and see what additional pieces you need.

These Standard elements are used issue to issue with few changes; they should run on the same pages every issue. Some examples follow.

Nameplate—Block off space at the top of the first page for the name of your newsletter, the APICS logo, your chapter logo or name, and the date of publication.

Table of Contents—Block off a small box, or be certain there is an area to list articles included inside the publication.

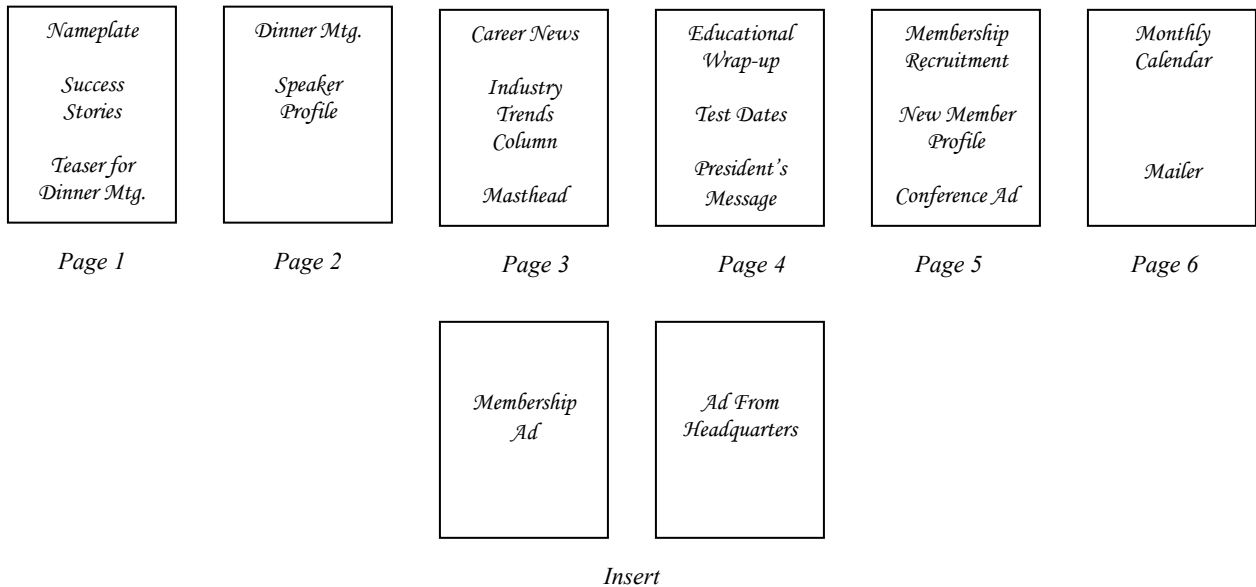
Masthead—Block off a small box of space on one of the inside pages or on the back page for the publishing information and the editor's name, address, and contact number. The masthead is essential for good public relations, so be certain to include it.

Calendar—Replace old dates and deadlines with new ones.

Advertisements—Ads can be set well in advance and placed at the bottoms of pages or toward the back of the newsletter.

Planning Pages

Planning pages do not show design, only content topics.



After you have placed the standard items on planning pages, decide on the most important and newsworthy stories and write their names on the planning pages, making each a lead story on each page. Then fill the page with titles of the remaining articles. Remember to include space for art and photos, especially those that will help highlight major articles.

It is probably easiest to place the first part of the most important stories on the first page and go toward the back in order of priority. However, the back of the newsletter should not become a graveyard for fragments of unimportant business. Some of your members may be "backward readers"—readers who start at the back of the newsletter and read to the front—and you will lose them.

The following page shows sample planning pages for a six-page newsletter. The first page includes a "teaser"—a one-sentence blurb—about the monthly dinner meeting, which is described in detail on the second page. Knowing the importance of page—one information in making the reader continue reading, the editor began with a thought-provoking piece on the first page instead of including only meeting information.

Copyfitting

As you assign stories, you will inevitably be asked "How much should I write?" Copyfitting is an easy way to get writers to write the correct amount. The easiest way to get the amount of writing you want is to count the number of characters (letters,

including spaces and punctuation) on an average line of your printed piece. Then have your writers set their typewriter or computer margins to allow for the same number of characters. The number of lines they write will translate directly into the number of lines you will have in the printed piece. If you use a standard column format, you can count the total number of lines of type you have on each page and assign article lengths that will add up to this total.

Many books contain information on more precise methods of copy fitting that enable you to plan your newsletter more carefully in advance. Once you have copyfit, compare story length with what you estimated on your planning pages. Then revise your layout, if necessary.

Determining Whether You Will Owe Unrelated Business Income Tax

Will your chapter newsletter include advertising? If so, you need to know about the unrelated business income tax.

Even though they are exempt from federal taxation, not-for-profit organizations may be subject to **unrelated business income tax**. The sections of the Internal Revenue Code that regulate this area are extremely complex and are interpreted on a case-by-case basis. These unrelated business activities must be reported on IRS Form 990-T.

Not-for-profit organizations are taxed on net revenues generated from unrelated trade or business activities. An organization's activities are exempt from tax only if they further the organization's exempt purposes. If the IRS determines that the unrelated business activities of an organization constitute a substantial amount of the organization's total activities, the organization's exempt status may be revoked. In defining a "substantial amount", the IRS looks at the time spent on the unrelated activity and the gross receipts from the activity compared with the organization's total gross receipts.

The following three criteria are considered when determining if an activity is subject to unrelated business income tax:

- The activity is a trade or business conducted for profit.
- The trade or business is a regular activity, as determined by the frequency and continuity with which the activity is conducted and how it is pursued.
- The trade or business is not substantially related to the organization's exempt purpose.

Revenue derived from advertisements in newsletters and other publications meet all three criteria. It is almost always considered unrelated business income and is therefore taxable. Here is how to calculate the net advertising revenue subject to the unrelated business income tax:

- Determine the proportion of the total costs of the newsletters that are applicable to

the advertising pages. One method is to determine the proportion of the advertising pages to the total number of pages for all newsletters published during the year.

- On the basis of these percentages, allocate the costs between the newsletter content (related business activity) and the advertisements (unrelated business activity). Be sure to maintain supporting documentation on how these costs were determined and allocated.
- Deduct the advertising costs from the advertising revenue to determine the amount subject to tax.

Complete IRS Form 990-T.

Seek the advice and counsel of a professional who is familiar with not-for-profit tax laws if you have any questions or concerns about the applicability of unrelated business income tax to your chapter. **The IRS offers little relief to organizations that fail to comply. If audited by the IRS and found to be noncompliant, you may face relatively large tax assessments with interest and penalties. In some cases, associations may lose their exempt status.**

Writing and Editing

Writing is the major force behind your newsletter. Exquisite design, beautiful printing, and high-powered graphics cannot save a newsletter that is poorly written. Good newsletters contain crucial, current information their readers need. Hints on writing and editing can be found in the Appendix, "What Makes a Good Newsletter?"

Choosing Types of Writing

Newsletters generally contain several different types of writing. These include straight news, features, editorial opinion, and promotional writing. Balance among these types is important.

- **Straight News**—Straight news stories lend credibility to information. Straight news stories use the "inverted pyramid" format, in which the most important information occurs at the beginning, and information follows in decreasing order of importance. You can easily cut the last few paragraphs if you run out of space and still retain the gist of the story. A good straight news piece ought to answer what journalists call the "5 Ws and H"—who, what, when, where, why, and how.
- **Features**—Features are a less stringent form of writing that thrives on clever beginnings, detail, and elaboration. They usually establish a personal feel. A good feature explores and answers the "why" or "how" question. For example, a feature might profile a local company that has drastically reduced its turnover rate. The focus would be on "how"—what measures effected the change, how workers felt about the company, and how work habits and productivity changed. The story might also answer who was most instrumental in the change and how they made a difference.
- **Opinion Columns**—Editorial opinion ought to be marked as such, either by a column headline or "opinion" tag. Otherwise, readers will fail to see your other articles as objective. Consider using the writer's signature or photo (as in a president's column) to further set off the article.
- **Promotional Writing**—Promotional writing takes on the air of advertising. If your purpose is to recruit members or announce an event, promotional writing may be appropriate. Make sure the piece contains a call to action toward the end, such as "Call today!" or "Make your reservations now!"

Writing with Power

There is certainly no formula that will turn you into Hemingway, Fitzgerald, or Faulkner, but making a conscious effort to do the following in your writing can make the difference between an unread story and one that is read.

- Sell knowledge, not events. Thought-provoking articles are valued over simple datelines.
- Be certain there is a news peg—an important, timely reason—for including each story.
- Write actively. Use more verbs and fewer nouns. Avoid weak verbs such as forms of the verb *to be* or *to have*. (For example, instead of saying "There are many people who buy APICS courseware," say "Many people buy APICS courseware.")
- Avoid changing verbs into nouns by adding suffixes such as *-tion*, *-ment*, or *-once*. (Instead of saying "We will provide information," say "We will inform.")
- Avoid verbs created from nouns. (Instead of *prioritizing*, either *rank*, *rate*, or *set priorities*.)
- Wherever possible, use active voice instead of passive. The active voice adds life to the sentence and clarifies the actor. (Instead of "The annual conference was held," try "APICS held its annual conference.")
- Avoid using such phrases as *respectively*, *the former*, and *the latter*. These terms force readers to refer to earlier statements, slow down reading, and impair clarity.
- Present items or steps in the order that they should occur.
- Use simple one-syllable words instead of longer words.
- Omit unnecessary words. Be concise with your statements. You do not need to omit detail or use small words, but every word should count. For example, "He is a man who" can be shortened to "He." Similarly, omit extraneous details, such as the menu for a chapter dinner meeting.
- Replace long or redundant phrases with simpler words. For example,

<i>instead of</i>	<i>use</i>
in the event that	if
subsequent to	after
prior to	before
true facts	facts
positive benefits	benefits
despite the fact that	although
because of the fact that	because, since

in light of
advance preparation
at this point in time
a large percentage of
are in possession of

because, since
preparation
now
many
have

- Beware of jargon. Explain terms, acronyms, and abbreviations that may be unfamiliar to some readers, especially secondhand or "pass-along" readers, who may be unfamiliar with APICS terminology. Use of field-related technical language may be necessary, but when a story includes too much, it becomes close to unreadable for almost any audience. Write to express, not to impress.
- Be consistent in your use of terms and acronyms that pertain to a specific project.
- Treat each topic as a paragraph. If your paragraphs are too long, look for natural paragraph breaks. If you cannot find them, your thoughts are probably disorganized. Rewrite.
- Put statements in positive form. Instead of writing "APICS will not accept your form if it is filled out incorrectly," try "APICS will only accept forms that have been filled out properly." Too many negative words can confuse readers. For example, "He did not know he had not been seen," could easily be reworded to "He was not sure whether he had been seen." In addition, a reader who is skimming an article may accidentally ignore a crucial word like *no* or *not*. (Instead of saying "Do not use negatives," say "Avoid using negatives" or "Put statements in positive form.")
- Use a consistent tense.
- Avoid shifts in tense, mood, subject, voice, pronoun, or number.
- Use parallel structure. Parallel structure means ensuring that a list or series of items is presented using the same parts of speech, such as nouns or verbs.
- Avoid parenthetical remarks. If information is important enough to include, it should not be enclosed in parentheses.
- Keep sentences short.
- Keep paragraphs as short as possible.
- Use bullets to list information.
- Break documents into manageable sections. Use informative headings and subheadings to provide clues to the reader.
- Make sure to budget sufficient, uninterrupted time in your schedule for writing; good writing takes time.

Writing Headlines and Captions

Writing extends beyond stories. In fact, the shortest writing you do may be the most important—writing headlines and captions. It is headlines, with the big, bold type, and captions, with their proximity to eye catching photos, that readers see first. In fact, if readers are not captured by a headline, they probably will not read the story.

When writing headlines, make sure the headline relates to the story. Standard headlines such as "President's Report" lack content and interest. Use present tense, even for past events. Also, use active voice. For example, replace "Baker Voted Best Member" with "Members Vote Baker Best." You will also need to write with space constraints in mind. Headlines should extend at least two-thirds of the way into the last column of the story they are placed above.

Every photo needs a caption—a single-sentence description of the action. Captions should be in present tense. For "mug shots" (headshots of people), name, and perhaps title, are sufficient.

Avoiding Bias

Avoid any bias (or implied bias) with respect to gender, sexual orientation, disabilities, medical conditions, age, ethnicity, and race.

- Do not make assumptions about the race, sex, age, religion, or disabilities of the generic "reader."
- Avoid such terms as "nonwhite" or "non-Christian"—these terms indicate the existence of a norm against which people might be judged.
- Avoid irrelevant categories. Readers need to know the race, gender, age, or handicap of an individual only if it relates directly to the story.
- Avoid discriminatory or offensive language or graphics that may offend readers in terms of age, culture, handicap, politics, race, religion, or other sensitive subjects.
- Rewrite sentences to avoid sexism.
- The generic phrases *he or she* and *his or her* should be avoided whenever possible; however, use them if there is no other way to rewrite a sentence.
- When providing hypothetical scenarios, use both masculine and feminine examples.

Understanding Trademarks and Copyrights

A trademark can be a word, name, symbol, device, design, or any combination of these that is adopted and used by a manufacturer or merchant to identify its products and services. It distinguishes the manufacturer's products and services from products and services made and sold by others.

A trademark is a valuable business commodity. An organization that registers its mark can prohibit others from using it anywhere in the country.

Use the designation [™] for trademark if the mark is not registered with the U.S. Patent and Trademark Office. If it is registered, use the symbol ® or the words "Reg. U.S. Pat. & Tm. Off." following the trademark.

Always include the ® or [™] symbols, as appropriate, when discussing APICS products and services. If you need further information about trademarks, contact an attorney who specializes in that field.

For products that are not your own, capitalization is sufficient to identify the name or product as being protected. Follow the company's capitalization and spelling for trademarked products. Trademarks are adjectives and should be used that way. For example, you would say, "I want an IBM computer"—not "I want an IBM." Misuse of a company's trademark can lead to legal action against the individual or organization that has misused the mark.

Copyright is a system for protecting of original works. Copyright protection is granted immediately upon the creation of the work. It does not depend on inclusion of a copyright notice in the publication or on registration with the Copyright Office (both of which confer certain advantages).

The author is the owner of the work produced, unless it is a "work for hire," in which case the employer or chapter becomes the owner of the rights. In addition, an employer is considered the author when the work is produced by an employee of a company. When dealing with people who are not employees, such as volunteer chapter leaders or consultants, an agreement must clearly state who owns the rights. Without a written agreement, ownership remains with the volunteer or member and will not belong to the chapter even if the information or piece was created for the chapter using funds provided by the chapter.

The basis for copyright protection is the presence of originality. Anything written or created by the chapter or a member of the chapter is copyright protected. However, ideas, business practices, inventions, facts, and trade names cannot be copyrighted. Inventions may, however, be eligible for patent protection.

Copyright protection is available to both published and unpublished work and covers catalogs, promotional materials, and lists of customers. In addition, the following categories can be copyright protected: literary works; musical works; dramatic works; pantomimes and choreographic works; pictorial, graphic, and sculptural works; motion pictures and other audiovisual works; and sound recordings.

The copyright on any work created after 1978 endures for the life of the author and for 70 years after the author's death. For work made for hire, the copyright period is 95 years from the date of publication or 120 years from the date of creation, whichever comes first.

A notice of copyright should be placed on each issue of your newsletter. The notice must contain either the word "Copyright," the abbreviation "Copr.," or the symbol ©. It also must include the year of publication and the copyright owner.

If you plan to use copyrighted materials in your newsletter, obtain permission from the holder of the copyright before producing the newsletter. Do not use photos, drawings, or cartoons unless they have been created specifically for your newsletter or you have permission to use them. Do not use a letter that was sent as private correspondence in your newsletter unless the writer of the letter gives you permission to print it.

To obtain permission to use copyrighted material, write to the copyright owner (the writer or publisher). Send a photocopy or description of the material you wish to use, a sample copy of your newsletter, and a self-addressed, stamped envelope. Ask the copyright holder to send you written permission as well as the necessary credit line. The copyright holder may charge a fee for the use of the materials.

Always assume that any information you find on the Internet is protected by copyright. Before using it, get written permission from the author or holder of the copyright. Also remember that not all information you find on the Internet is correct.

Although APICS chapter officers are not copyright experts, it is important to understand what you can and cannot include in chapter publications and materials. Because copyright laws change frequently, you should obtain written permission of the author before publishing any articles or information. Be sure to consider copyright issues when coming up with names for your programs, products, and services. Most national advertisers have registered their ad slogans and graphic devices and will aggressively pursue organizations that infringe on their rights.

Editing

In reviewing articles, first make two "passes" through the writing and editing and then the proofreading.

If you write all of the newsletter's articles, leave several days between when you write and when you edit. If you use other writers' stories, you can move to the editing phase as soon as you receive the pieces.

First, check the flow of articles, making sure all facts are correct and that sentence structure makes sense. Ask yourself key questions: Will my audience like this piece? Will they keep reading? Did the writer cover all necessary parts of the topic? Is the story accurate?

It is also your responsibility as editor to ensure that the tone is consistent across all articles. Of course, if you write them all, this is an easy task.

Proofreading

Proofreading is perhaps the editor's most important function. Readers who may not

notice design flaws or content weaknesses will always notice misspellings and typographic errors; then they will discount your publication on the basis that "those people cannot spell."

It is very difficult to see errors in articles you have been working with for some time. Ask someone who has not read the newsletter materials to proofread the newsletter. If you must proofread, leave as much time as possible between editing and proofing. Some editors of chapter newsletters appoint several members to do the proofing, giving a second, more removed look at the piece.

The word "proof" is thrown around a lot, but proofreading is a skill. With this simple checklist, you (or one of your proofreaders) may save yourself some embarrassing mistakes.

- Check dates.
- Read backward, word for word, to find typos.
- Double check the spelling of people's names. Be certain applicable certification status and business affiliations are correct.
- Make sure all people mentioned have titles before or after their names.
- Check for spelling, punctuation, and grammatical errors.
- Watch the length of paragraphs. Make sure all paragraphs are short, generally fewer than three sentences.
- Eliminate cliches and passive voice wherever possible.
- Check for tense changes within an article.
- Be sure acronyms and special terminology are explained the first time they are used, even if you think they are obvious to readers.
- Verify that all graphic elements are printing correctly, that they appear in the right place, and that all elements appear on graphs, charts, and diagrams.
- Check for inconsistencies in style.

You may want to set your own style, but perhaps it is the easiest to use an already established style manual, such as *The Associated Press Stylebook and Libel Manual* or *The Chicago Manual of Style*, to guide your style decisions.

You may also want to create a style guide to cover the words and phrases you commonly use. When you make new decisions, record them in the style guide. You can use the style guide for proofing every newsletter and pass this guide along from editor to editor to ensure consistency through the years. It will save the new editors the time involved with making and recording these decisions.

Sample Style Guide

<i>ABCD</i>	<i>MNOP</i>
backflush BOM—bill of material CAM—computer-aided manufacturing	MRP—use material requirements planning nonmember
<i>EFGH</i>	<i>QRST</i>
finish-to-order Gantt chart	queue setup SKU—use stockkeeping unit
<i>IJKL</i>	<i>UVWXYZ</i>
Just-in-Time (JIT) kanban lead time	work in process (noun): but work-in-process (adjective) world class (noun): but world-class (adjective) ZIP code
<i>NUMBERS</i>	<i>MISCELLANEOUS</i>
One to nine: 10+ 1.000 1990s	Serial comma Italicize publication titles: enclose chapter and article titles in quotation marks

Design and Production

With poor design, even the best writing may end up in the trash can. The newsletter's appearance must say to the reader "I am interesting; read me!" If readers cannot find the stories they want, they will not read the newsletter. Likewise, if your design reflects patterns popular in the 1970s, readers will assume they should have stopped reading the newsletter years ago.

Design is an integral component of any newsletter, and it ought to be considered up front, not after you have finalized the content. That way, design and editorial content complement each other.

You do not need to be an art director to establish and use design and layout to your benefit. Simplicity should be the rule. You can use sophisticated design and layout characteristics to catch the reader's eye, but your objective should be to make your newsletter readable.

Design and layout should serve as a road map, leading the readers through your publication and getting them to the important points. In other words, layout should organize information. Readers may spend 30 seconds, three minutes, or even 30 minutes with your newsletter. If you use graphic elements to organize information, readers can spend less time being confused and more time reading.

By borrowing the following basic rules and principles from graphic arts, you can make design work for you.

The golden rule of design is "form follows function." In other words, meaning dictates design. Every design element should be used to spotlight or work with content, not used simply because it looks pretty, and certainly not because it draws attention only to itself.

Another rule is the rule of thirds, which states that one-third of all material on a page should be gray (type), one-third white (blank space), and one-third black (photos or rules and dark graphics). This technique provides maximum contrast, and therefore maximum excitement, on a page.

The Appendix of this manual "What Makes a *Good* Newsletter?" contains a checklist of additional design hints.

Understanding Basic Design Principles

Unity—All elements in a newsletter or on a page should combine to be uniformed.

Emphasis—Create a focal point on each page. That is, determine the most important article on each page and make it stand out by placing it high on the page, by including a photo with it, or by putting a large headline above it.

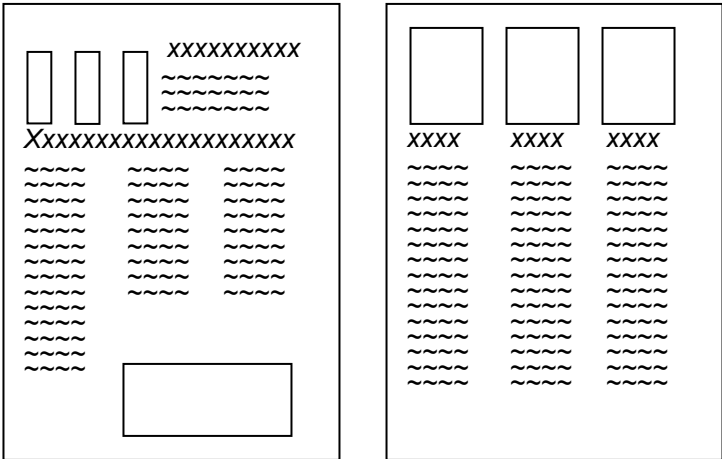
Balance—There are two kinds of balance—symmetrical and asymmetrical. Symmetrical balance, which is more traditional, relies on mirror images for balance. Strong asymmetrical balance, in which the "weight" of the page is on one side or area, is less staid and is currently in vogue with designers. It is also more difficult to execute effectively.

Proportion—Proportion is the relationship of elements to one another. For the reader, the larger the element, the more important it is. Two elements of equal proportion usually have equal mental "weight." Consider proportion when deciding how long an article should be or whether one photo should be larger than another.

Rhythm—In design, rhythm is established by repeating elements. For example, a running footer with the newsletter title, date, and page number on every page establishes rhythm.

Contrast—A moderate amount of contrast gives excitement to a newsletter. For example, if you have a particularly large mass of gray type, contrast it with white space.

Types of Balance



Asymmetrical

Symmetrical

Overhauling the Design

All design elements say something. If you are using an outdated logo, for example, you are giving prospective members the impression that the thinking of APICS members is stale—a far cry from the cutting-edge image that could attract these people.

Each element of design is important, but there is no need to reinvent the wheel each month by redesigning all facets of your newsletter. Establish a template by making the following decisions. Then use the template for all issues. If you use desktop publishing software, you can often store much of this information on your computer.

Decide on Size—An 8½ inch -by-11-inch format is simple and practical, because it is standard for graphic arts products and printing. Tabloid-sized newsletters are harder to hold and more difficult to store than 8½ -by-11-inch newsletters. Newsletters with pages smaller than 8½ by 11 inches do not easily accommodate large graphics.

Decide on Paper—Your selection of paper will be driven—at least in part—by your budget. The cost of paper can represent as much as 40 percent of the cost of printing your newsletter. If your newsletter will be printed rather than photocopied, you may wish to use your printer's "house sheets," which the printer buys in bulk. Companies such as Paper Direct can supply paper specifically designed for newsletters. Color graphic elements are incorporated on these papers, so you can produce a newsletter with color accents even by photocopying the newsletter. You can design your newsletter template with the paper in mind.

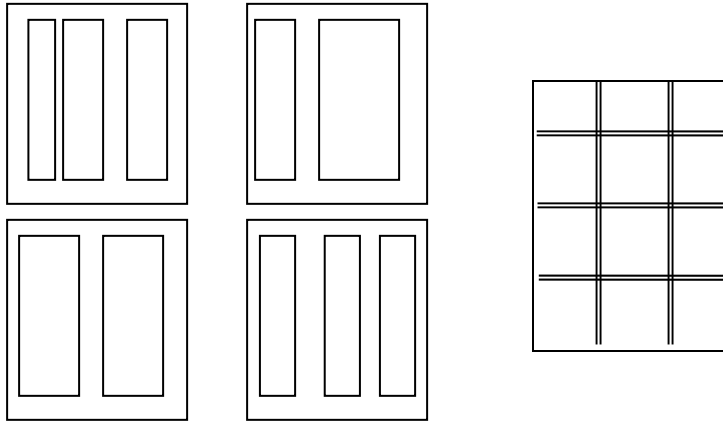
Decide on Color—The color of paper or ink should not detract from readability. White provides the most contrast with black ink. Also, each color of type has a different connotation, so be careful when using spot color (ink). For example, red often signals anger, heat, or danger in readers' minds; it is definitely an attention-getter. Yellow, on the other hand, is difficult to see.

Decide on Back/Front Pages—Think about how your readers will receive and open your newsletter, especially when planning how it will fold for mailing.

Establish a Grid—The consistent use of one pattern sets the tone of the publication and creates a professional image. Many editors create a grid to achieve these goals. Grids force the newsletter away from a report format. They keep maintain consistency while allowing for more variety than you would think. Grids enable you to separate and spotlight each article.

A grid is a series of imaginary lines that divide the page into rectangular patterns, indicating how many columns of text there will be per page. The same grid is used on every page. See examples of possible grid systems on this page.

Grid System



In designing your final product, place articles within the grid you have established. Make each story its own "box," complete with a headline; then it will be clear where each story begins and ends. Readers will not have to look through the newsletter to find the final paragraphs of the stories they want to read.

Decide on Typeface—If you are using a desktop publishing program, you should know some basics about type.

Type used for the text of articles is called body type. Larger type (above 14 points high) is called display type.

Typeface

Body type

Display Type

Choosing Alignment

There are four types of alignment run back.

The type in this paragraph is **justified** (flush left and flush right). It is most commonly used for newsletters and newspapers, but it may create an uneven feel as it stretches or compresses type to fill the column.

The type in this paragraph is **flush left** (also called left justified or ragged right). It aligns vertically along the left side of the column; next to justified type, it is the most common format and the most readable of all formats. Flush-left type is less formal than justified type.

The type here is **flush right** (also called right justified or ragged left). It aligns vertically along the right side of the column. Since English-speaking people are taught to read from left to right, avoid using this alignment for long stretches of text.

The type here is **centered**. It is both ragged right and ragged left.

Selecting Type Styles

A type style is a unique style of type that has its own characteristics. Examples are Bookman, Tahoma, Tunga, Arial, and Times New Roman. Use the same type style for all body text—avoid mixing styles. An unwritten rule is to pair a serif body type (one with "feet" or small horizontal lines on the ends of the letters) with a sans serif headline (one with plain, nonfooted, letters). Avoid cute or extremely ornate typefaces, especially for headlines, as they are difficult to read. Combining too many typefaces on a page creates a chaotic look.

Examples of Types Styles

Bookman
Tahoma
Tunga
Arial
Times New Roman

When deciding how many characters wide a column should be, a safe line length is between 36 and 65 characters. Use type faces that are legible and comfortable to read at the size you will use in the newsletter.

Plan how you will generate type for your newsletter because this decision may affect design. To save on costs for typesetting, you may want to consider using with a laser printer and then copying your newsletter a high-quality photocopier. The resolution of type generated by laser printing is about 300 dots per inch (dpi), compared with 1,000 to 2,400 dpi for typesetting, but the loss in quality is often barely recognizable to the untrained eye. In fact, if you pay a slight fee to a printer who has a linotronic machine, you can achieve near-typeset-quality type by providing your file and having the printer run it out. (The printouts from dot matrix printers are often too light or the type too broken up to read clearly.)

Decide on Headlines—The typesetting and layout of headlines matter. Here are some general rules:

- Each article should have a headline above or to the left of it.
- Headlines should not be set next to each other on the same level so that they bump (run almost into each other).
- Use initial capital letters only. Readers have a harder time deciphering all capitals than they do viewing the normal combination of upper- and lower-case letters.

- If you use different sizes of headlines, headlines should decrease in size according to their descending placement on the page.

Typesetting Tips

If you are using word-processing software or a desktop-publishing program for your newsletter, the following tips should help you achieve a more professional-looking newsletter:

- Use true typesetters' marks ("smart" or typographer's quotes for quotation marks and the em-dash [—] for a dash).
- Use only one space after a period.
- Use italic type instead of underlining titles.

Design Tips

While design is highly subjective, here are some easy ways you can add design elements to a newsletter even if you do not have the time to plan a design overhaul.

- Use subheads and bullets or boxes to break up long stretches of type.
- Eliminate trapped white space—empty space bordered on all sides with type. Instead, keep the white space to the outside margins of the publication or fill it with a quotation copied from the article and printed in a large type size also known as a pull quote.
- Make sure the body type is set in a point size no smaller than nine points, except in lists, which may use a smaller type.



Keep your newsletter's look simple and uncluttered. White space is free. Although adding white space to pages may cause your newsletter to run more pages, no one will read a newsletter so crowded with type that is barely legible.

- Package related material (that is place related articles close to each other). One technique is using sidebars—small, boxed stories appearing with a main article. For example, you may want to link a speaker profile with the article that announces and describes an upcoming dinner meeting at which that professional will speak.
- Avoid continuing too many stories to other places in the newsletter. You will end up with a fragmented look. If a story must continue from one page to another, be certain that it continues only once. Be certain that the continued section of the story contains at least two inches of type.
- You may also wish to use a small graphic element, such as a box (•), to indicate the end of an article. This element is called a dingbat.

- Don't fear empty (white) space or cram it with irrelevant graphics. In fact, readers like white space because it offers a respite from reading.
- Make sure each page includes a page number, name of the publication, and date of issue. You may want to establish running feet or heads (standard lines) that contain this information.
- Use tables, charts, and graphics for clarity. Although graphic elements can be an effective way to present complex data, do not attempt to pack them with useless information.
- Be certain that graphics serve the intended purpose. For example, if you are using a chart to show the superiority of APICS products over other courseware, be certain that the chart actually demonstrates this superiority.

Using the APICS Logo

In 1993, the APICS Board of Directors made the strategic decision to refer to the association as *APICS The Association for Operations Management* rather than the American Production and Inventory Control Society in both internal and external communication vehicles. This change enabled APICS to retain its acronym, which is recognized worldwide as a standard of professional excellence, while at the same time reinforcing its image as a global provider of integrated resource management education.

To reinforce APICS' image in the marketplace, it is important that all communication vehicles—both at headquarters and the chapter level—feature a consistent use of our logo and tagline.

To assist you in using the logo in chapter newsletters and other published documents, APICS provides the electronic versions of the APICS log via the Volunteer Resources Section of the Web site.

As a reminder, APICS' Standard Operating Policies and Procedures require individuals, chapters, regions, licensees, and affiliates to clearly and prominently show their identities immediately adjacent to the logo/acronym on all printed materials produced by those users. For example, if you are using the APICS logo and tagline on the nameplate of your chapter newsletter, the chapter name and logo must also be displayed.

When referring to APICS in written documents, the first reference should read *APICS Magazine*. Subsequent references in the same document should read *APICS*.

Art Alternatives: Tips on Using Photos and Art

"Art" is used by printers and designers to mean any type of graphic material, from photos to illustrations to graphics. Art is a major part of design. If photos and art are indiscriminately placed, they confuse the reader. Placed correctly, they highlight

content. Possibilities for art are almost limitless, including the following:

Screen tints—Also known as *shadings* and *fill patterns*, these are dot patterns that allow for some paper tint to show through. You generally specify screens in increments of five percentage points. Nothing higher than a 30% percent screen should be used over type, because darker screens will hide type.

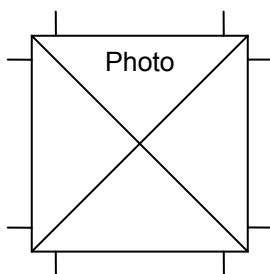
Graphics—In the operations management and supply chain management profession, diagrams can often clarify a complex process or structure much better than words. Graphics repeat or reinforce information in the text; they highlight, signify importance, and break monotony. They are also useful as maps showing directions to a plant site or dinner meeting. Avoid using meaningless graphics. Be sure that graphics are clear and easy to understand.

Photos—Photos generally increase readership. They can convey information more quickly and completely than words alone and usually boost the egos of their subjects. If you are using two colors, do not print black-and-white photos in the second color unless you are certain how the final product will appear. Bluish, reddish, or greenish people appear unusual, to say the least.

Visual appeal makes the difference in whether your pictures really are worth 1,000 words. To ensure good reproduction, check for the following qualities of a good photo:

- good contrast between the black areas and the white areas
- sharpness of focus
- clarity, not graininess
- matte, not glossy, finish
- black and white (Color photos cannot be reproduced in black and white without losing quality.)
- unstaged—avoid handshake or plaque-passing ("grip and grin") photos

Photo with Crop Marks



Before sending your photos to press, crop them, using marks like those in the graphic below. Use a red pen or another writing instrument whose marks can be easily seen.

Cropping can change the basic proportions of your photo and enables you to turn mediocre photos into terrific shots by cutting out unimportant areas (a gray wall space, for example). Ask yourself, "What is interesting in this photo?" and zero in on it. You may also want to crop to change the size of a photo so it fits in your layout.

Generally, cropping is used along with enlarging or reducing to make a photo fit a page layout. Reducing the size of art and photos improves quality, so it is much better to start with a large photo and size it down or ask your printer to do so. If you increase a photo more than 200 percent, it may become extremely grainy.

Through simple ratios of the printed photo to the original photo, you can determine the enlargement or reduction you need. Proportion wheels, which you can buy at most artist print supply stores, enable you to perform computations more quickly.

If you need expertise in dealing with photos, consider using a camera service, which makes photo mechanical transfers (PMT), halftone negatives, and printing plates.

Art—Art is another alternative. If you do not have a resident artist, consider clip art—sketches and graphics that are designed for broad use and are not copyrighted. Books of clip art can be found in many bookstores or artist supply stores. In addition, electronic clip art packages are available for your computer.

If you are low on art or photographs, consider using typeset type for pull quotes. These bolder pieces of text pulled from the story are often rimmed by top and bottom horizontal rules. If you do not use a desktop publishing package and are not having your entire newsletter typeset; set these with your headlines and then paste them into the final layout. They will add the contrast and focus you need to make a typed page look inviting.

Desktop Publishing

If you are using desktop publishing software to lay out your newsletter, you can establish a template (including a nameplate). Bring articles from your word processing software into the page layout program, apply the styles you have selected, and make necessary adjustments. As the distinctions between word processing software and desktop publishing packages blur, many word - processing packages have enough features that you can use them to lay out your newsletter.

If you use manual paste-up, execute design either by laying out all pieces on boards designed for printing or by paying your printer to do this for you. Follow the design you have established and double check, before you take the piece to the printer, to make sure you have included page numbers on all pages and ruled boxes to let the printer know where each photo goes. Label each photo with a description pasted on the back of it.

Printing and Mailing

After all the newsletter articles, photos, and graphic elements have been selected and layout is complete, the newsletter editor has not finished the job. The newsletter must still be printed (or photocopied) and mailed to members. The newsletter editor must understand some aspects of printing and mailing the newsletter.

Working with Printers

Stick to your deadlines, and your printer's staff should be able to honor theirs. Some printers are used to padding deadlines so they can accommodate rush requests. However, do not take advantage of your printer by asking for a last-minute, rush job. You incur extra costs and risk poor quality production by doing so. Plan printing time into your schedule during the planning process by asking the printer how much time the shop will need.

Remember that you are the customer. Be certain the printer knows your expectations of quality, service, and delivery.

Also, remember that price per unit decreases as quantity increases, so make sure to ask for "price breaks," quantities at which price per unit decreases considerably.

Two types of printers are most suitable for newsletter production: quick printers and commercial printers. **Quick, or instant, printers** look for a small number of copies and simple jobs that customers need quickly. They make plates directly from what you provide as camera-ready copy. In other words, what you see is what you will get. Quick printers are appropriate for press runs up to about 2,000 copies. After 3,000 copies, quick printers are rarely less expensive than commercial printers. Turnaround time for quick printers is much shorter than for commercial printers.



Preprint-if you want to use a second color and know you will use it consistently in each issue (perhaps for the nameplate), consider preprinting the accented elements to save on color costs. Your printer can store the preprinted stock and retrieve it for each issue, printing only the black ink at that time. Make sure your printer can do quality preprinting and has proper storage for the materials.

Commercial printers seek a larger number of copies and more complicated jobs that take one to two weeks to produce. Printers' representatives provide a level of service that may make commercial printers a better option than quick printers.

Whichever type of printer you use, make sure the shop can reproduce your newsletter clearly and sharply. Price quotations should be solicited from local printers annually. Contracts of this length enable you to build rapport with your printer. Since they assure a printer of regular work, you are likely to save money and get jobs out on time.

When you solicit price quotations, be specific. You need to provide the printer with information about the number of pages; and size, whether the pages will be folded stapled or bound in any way; ink color (or colors), paper weight and color, the number

of copies to be produced; , time schedules, and the number of photos that will be included. Ensure common understanding and cover yourself by noting in writing any other needs you have. Print trade customs specify that anything unwritten is not covered.

When newsletter layout is finished, provide a clean original. If your newsletter contains many photos, screens, or reversed type, ask for a blueline, a copy that shows all colors in blue and is a proof created from the negatives. Bluelines enable you to check these elements one final time before the piece is printed.

When reviewing your proofs or bluelines from the printer, verify that: the proof matches your latest laser proof fonts are exact; line spacing, photos, and art images are cropped and placed on the pages properly; and color breaks and screen values are shown correctly. Pantone Matching System (PMS) colors, paper stock, and quantity should also be verified. Mark any corrections on the proof, and initial and mark any special instructions on the ticket provided with the job.

Your printer will probably ask you to make a decision about paper stock. The cost of paper makes up 20 to 40 percent of the cost of printing a newsletter, so this decision is not one you should leave solely up to the printer. Four grades of paper are suitable for newsletters: bond, uncoated book, coated book, and text.



To save money, ask your printer for “house sheet,” paper kept in the printer’s inventory and used on many jobs. Another way to save money on paper is to buy from a distributor having a sale or closeout. If you do so, you may want to talk with your printer to learn about the best deals.

- **Bond**—Also called *photocopy, cotton, or sulfite*. Bond paper is designed for letter writing or printing on one side of the paper only, and show-through printing that appears on the other side of the sheet may be a problem.
- **Uncoated book**—Also called *offset, opaque, or general printing* paper. Suitable for general printing of all kinds, uncoated book is the most common for commercial printers and is readily available for quick printing and photocopying. Uncoated book paper generally costs the same as bond paper of comparable quality, but it is better for newsletters because it is designed for double-sided printing.
- **Coated book**—Also called *coated offset, enamel, gloss, dull, or matte*. Coated book gives better ink holdout than uncoated book or bond paper. Coated paper comes in several finishes, such as matte, dull, and gloss; it costs about 20 percent more than comparable quality uncoated stock. Coated paper gives a professional, slick or smooth look, but check to make sure the glare is not tremendous—readers should not need to squint when they read.

- **Text**— Short for textured, *text* has patterns pressed into the surface that give added depth and a rich feel. Although it is capable of creating impressive graphic effects, text paper is generally expensive.



Use black ink on white or light-colored paper. Both are generally less expensive, and the combination is the best choice for visibility and clarity of reproduction.

Printers often ask what weight of paper you want. As paper types and their appropriate weights vary widely, you should ask your printer to provide you with paper samples. Most printers will gladly send you samples. Usually, the least expensive color option is white because it is in greatest demand and is the easiest to make. There are, however, many different shades of white.

Sending Electronic Files to the Printer

When you prepare electronic files, review the contents before sending them to the printer. An unorganized or incomplete file may print well on your laser printer, but could cause problems at a printing company.

Verify that all necessary files and art are included with your project. You must send the printer electronic files such as graphic files (tiff, eps etc.), screen and printer fonts, and titles and version numbers of software packages. In addition, provide a list of these materials. Include any special instructions.

Also send laser copies that are marked with specifications as they appear in your files and as you intend to see them on your proof and in the final product. Electronic prepress personnel can use these to verify the accuracy of the film output. Color copies, color laser copies, or black-and-white laser copies of color separations (marked for each color) are helpful to show color usage.

Mailing

If you mail your newsletter and have not already checked with your local post office for mailing regulations, do so before you produce your next issue. Your decisions on newsletter size and folding options will affect the cost of postage, so know your boundaries in advance. Postal regulations are complex and may be interpreted differently by local postal officials. Also, postal regulations prohibit mail pieces that do not conform to requirements about size, color, indicia, and return address.

As the number of copies you mail increases, postage becomes a larger percentage of your total newsletter budget. Therefore, the more copies you mail, the more concerned you should be about reducing mailing costs.

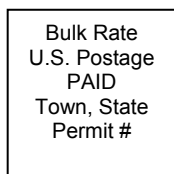


Update your mailing lists frequently to eliminate names that are no longer applicable.

A brief description of postal options follows:

- **First class**—With overnight delivery locally, first class is the quickest and most expensive choice. First-class delivery conveys an image of important news that is timely. By using first class and printing "Address Correction Requested" one-fourth of an inch below the return address, you will keep your mailing lists clean because, since the post office will return corrections to you. Weigh a dummy newsletter on the postal service's scale before printing your pieces, since first-class postage is determined by the ounce and you do not want to design a newsletter that is too heavy to mail on budget.
- **Periodicals**—For periodicals published at regular intervals at least four times a year, second-class postage gives you slightly slower than first-class delivery time at about half of its cost. Most newsletters qualify for second-class rates and service, but few take advantage of them. You must mail at least 200 newsletters and file an application with your local postmaster. Regulations, some sorting, and fees are involved, but they are generally worth the service and savings you gain.
- **Standard mail**—Also called *bulk rate*, third class is the least expensive category. It is also the slowest, and delivery can take anywhere from four days to three weeks. There is a 200-piece minimum. You will need to get a permit from your local post office as well as instructions on the proper way to presort your newsletters. The process is time consuming, but the cost savings may be worth the time. You will also need to use an indicia containing your specific mailing-permit information. (See sample on this page.)

Example of Indicia



Do your own sorting and mailing instead of paying the postal service or an outside service to do so. If you mail more than 500 copies, you can presort your first class mail and earn a discount. Follow the strict postal regulations exactly. Presorting does involve a small annual permit fee, but may save you hundreds of dollars each year.

You can track the mailing time of any of these choices by asking several chapter officers in different locations to call you when they receive the issue or by mailing extra copies to yourself at your office and at home.

The U.S. Postal Service publishes several helpful publications that are available from your local account representative or postmaster. Call to obtain a complete list of current publications, or check the Postal Services web site (www.usps.com).

Expanding Your Circulation

Many APICS chapters have used a variety of the methods listed below to expand their circulation and further their goals of membership recruitment and retention:

- Print a routing slip on your mailer so that it circulates within offices.
- Print "Please Post on Company Bulletin Board" or "Meeting Announcement Enclosed" on the address panel of your newsletter.
- Mail your newsletter as a reminder to rejoin for members whose membership has recently expired.
- Mail your newsletter to targeted nonmembers as part of a membership campaign.
- Share ideas. Put other chapters on your mailing list, and place your chapter on theirs. Send your newsletter to region staff, headquarters (chaprel@apicshq.org), and chapter presidents within your region.
- Mail your newsletter to nonmember attendees of chapter functions.

Appendix A: What Makes a Good Newsletter?

CONTENT

- Content breaks down into the areas of planning, writing, and editing.

PLANNING

- The newsletter's focus is primarily educational, providing an informational service to the members about APICS and resource management.
- There is a president's or officer's column that provides an opportunity for communication from the board of directors to the members.
- The newsletter's attitude toward APICS is positive and inviting.
- The newsletter contains a calendar of events so that dates and information about upcoming events are easily located.
- Article length and placement logically reflect news values.
- More articles are about future happenings than past events.
- The newsletter includes different types of articles, balanced against each other for variety (i.e., long vs. short, lighthearted, features).
- Current membership application is prominently displayed.
- Newsletter requirements and submission deadline dates are provided.
- The newsletter editor's name, phone number, fax number, and e-mail address are displayed.

WRITING

- Headlines are in present tense and clearly reflect article's topic.
- The articles begin with good leads, generally 25 to 30 words, and contain the most important or current facts.
- The copy employs third person.
- The writing is lively and concise.
- Articles are written in a news style giving accurate details.
- Articles include contact information, if appropriate.

EDITING

- Direct quotes, indirect quotes, and narration effectively interplay. Sources of quotes are identified.
- Writing is free of spelling, punctuation, and grammatical errors, and typographical and mechanical faults.
- Writing gives adequate background of people mentioned (first and last name, title, organization).
- Paragraphs are short, not too wordy, generally three sentences.
- Writing avoids passive voice wherever possible.
- Style is consistent.
- APICS certification status is given for all persons mentioned, including board of directors list and masthead.

DESIGN

- APICS logo with tagline and chapter's/region's name are used. APICS logos are available via the Volunteer Resources Section of the APICS Web site.
- Stories of highest importance run on page one.
- Front page space is not given to routine coverage of past events (i.e., past chapter/region meetings).
- The front page has a focal point that dominates the page, gives it order, and characterizes the subject matter. It may be a major story, a photo, or a piece of art.
- Compatible typefaces have been used throughout the newsletter.
- Each page includes a page number, name of the publication, and date of issue (running footers or running headers).
- Story layout is simple and recognizes that readers read from left to right
- Columns are used.
- White space is used effectively.
- The body type is set in a point size no smaller than 9 points, except in lists, which may use a smaller type size.
- Related material is packaged (set close together). This may be done through use of a sidebar—a small boxed story.
- Headlines do not bump (run into each other at the tops of columns) and are in readable type, becoming smaller as the reader moves down the page (generally sans serif and not all uppercase).
- The newsletter has a masthead (where editor's name, phone number, and address are clearly apparent).
- The nameplate is simple, easily readable, and includes the date of issue and name of the organization.
- The newsletter uses subheads and bullets or boxes to break up long stretches of type.
- Reproduction is clear and sharp, neither too light nor too dark.
- Graphic statements are made using special typefaces, special headline arrangements, rules, screens, boxes, and other devices.

Appendix B: Sample Newsletters



The Phoenix Chapter (Region 7) uses an outside design firm for layout and desktop publishing of *The Sahuaro Newsletter*. The designer has used color effectively. Black-blue and hot pink are used for accent colors, with text printing in black. Screens are pale blue or gray.

Statistics

Number of pages: 13
 Number of members: 398
 Total circulation: Membership list



Ohio Valley Chapter (Region 13) *Ohio Valley Newsletter* uses black and blue text with white background. APICS logo on front page. This type of newsletter can be created with a basic word-processing application. Interior pages have a simple, two-column layout with graphics and text..

Statistics

Number of pages: 13
 Number of members: 98
 Total circulation: 200+



The **Richmond Chapter's** (Region 11) *Richmond News* prints on cream stock in black with blue accents for headlines and some text material within boxes. Note the effective use of the APICS logo on the front page.

Statistics

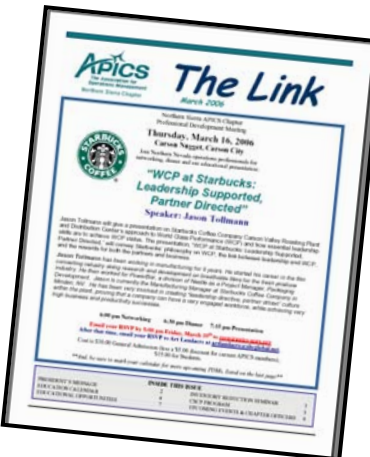
Number of pages: 4
 Number of members: 170
 Total circulation: 700+



The **Colorado** (Region 6) *Front Range News* consistently includes photos throughout the newsletter. The text is blue on light gray stock. Graphic accents are dark blue and include lighter screens.

Statistics

Number of pages: 12
 Number of members: 328
 Total circulation: 700+



Northern Sierra (Region 10) *The Wave* prints text in a blue-violet and red shade. Graphics are printed in teal. The Link Newsletter effectively uses text, graphics and photos.

Statistics

Number of pages: 8
 Number of members: 135
 Total circulation: 1000+

Appendix C: Glossary

AA—Author alteration. Any change or correction made by you at blueline or galley stage with a printer. You pay the printer for making these changes.

Alley—Space between columns of type.

Alteration—Any change in a typesetting or printing job once you have agreed with the printer on specifications.

Banner—Same as **nameplate**. Also, a headline that stretches across the page.

Bleed—Any printed matter that extends beyond or all the way to the page boundaries.

Blue line—Photographic copy of newsletter in which all colors are represented by blue image on yellow paper.

Blurb—Short quotation from an article repeated in large type as a graphic element within the column of text.

Body copy—Also called body text and body type. Type/words used for text of an article.

Book paper—Grade of paper suitable for newsletters and general printing.

Bulk—The thickness of paper, expressed in thousandths of an inch or pages per inch.

Bulk mail—Third-class or standard mail.

Bullet—Bold dot used for emphasis, often in place of numerals in a list. Adds graphic emphasis.

Burn—In printing, to expose a proof or plate to light.

Call out—Descriptive label used as a photo or art caption and generally placed directly below these.

Camera-ready copy—Type and art fully prepared for printing.

Caption—Text that accompanies and identifies a photo or drawing.

Character—Any letter, numeral, symbol, punctuation mark, or space between words.

Cheshire labels—Addresses printed on wide computer paper in a format that can be cut into labels and affixed to newsletters by machines built by the Cheshire Company.

Clip art—Copyright-free drawings that are camera-ready for printing.

Column inch—One inch measured vertically down a column.

Comp—See **Comprehensive dummy**.

Comprehensive dummy—Handmade, full-size replications of a newsletter, complete with fake type, graphics, and colors (if any).

Copy—Words of a story written for production.

Copyfitting—Process of editing copy and adjusting type specifications so that type fits in the space allotted on the layout.

Cut—A photo.

Cutline—See Caption.

Dateline—Line displaying the date of publication. Usually contained in the masthead of a newsletter.

Dingbat—A character, such as @ or #, used for decoration or emphasis. Often signifies the end of an article.

Display type—Type used for headlines. Generally 14 points or larger in size.

Drop cap (drop capital)—A capital letter whose top aligns with the top of the type on that line and whose body takes up the depth of several lines of space.

Dummy—Drawing showing the desired positions of type and graphics on a page. May be a sketch or proofs pasted in position to form the pattern. See also comprehensive dummy.

Em—Measure of width equal to a lowercase m in a given typeface.

En—Half of an emspace.

Expanded type—Style of type having a "wide" look.

Finish—The surface characteristics of a paper.

Flag—See Nameplate.

Flush left or flush right—Type that aligns vertically along the left or right side of the column.

Graphics—Rules, screens, charts, tables, photos, drawings, and other visual elements used to make printed messages clearer.

Grid—Pattern of imaginary or nonprinting guidelines on the computer screen used to align copy.

Gutter—Vertical white space between columns of type at the center of the newsletter, sometimes also stands for space between each column.

Hairline—Line or gap the width of a hair—1/1000 of an inch.

Halftone—A photograph made through a screen to convert an image to dots.

Headline type—See Display type.

Indicia—Postal permit information printed on objects to be mailed and accepted by the postal service instead of stamps.

Initial capital—Also called **initial cap**. The first letter of a paragraph that stands out by its large size.

Jump—To continue a portion of an article to another page. Also, the continued portion.

Kicker—Small, secondary headline that appears above an article's primary headline and supplements that headline.

Layout—Plan for newsletter showing position and size of text and graphics.

Lead—The first paragraph of a story.

Letter spacing—Amount of space between letters.

Masthead—Special boxed area on the editorial page, an inside page, or the mailing page that contains name, address, phone number, or e-mail address of editor, publisher, contributors, as well as frequency of publication.

Mechanical—Camera-ready assembly of type and graphics, complete with instructions to the printer. May also be called a keyline or pasteup.

Mockup—See Dummy.

Nameplate—Portion of front page that graphically shows name of publication. May include logo, dateline, and other information.

News peg—An important, timely happening that gives immediacy to a story and a reason for having the story.

Nonrepro blue—Nonreprographic blue. A color used in pencils or pen that does not show up in the photographic process and can be used to mark boards or proofs.

Page proofs—Trial-run pages provided by a designer or printer to enable the editor to check positioning and type on a page.

PE—Printer's error. A mistake made by the typesetter or printer. You should not be charged for the correction of these errors.

Pica—Approximately one-sixth of an inch. Used to measure the column width of type.

Point—One-72nd of an inch. Used to measure the height of type.

PMS—Pantone Matching System. Trade name of Pantone, Inc., for ink colors in that company's color matching system; since this color system is internationally known, it is a standard way to communicate specific colors to the printer.

Photostat—Camera-generated paper prints, line or halftone, made without a negative and used in pasteup. Also called PMT and stat.

PMT—Photo Mechanical Transfer. A Kodak trade name. See **Photostat**.

Press run—Also pivot run and number of pieces printed.

Price break—Quantity level at which unit cost of paper or printing drops considerably.

Proof—Test sheet made by the printer to reveal errors or flaws, predict results, and record how a newsletter will appear. Also short for **Proofread**.

Proofread—To look for errors in typing and style.

Ream—Five hundred sheets of paper.

Reverse—Type or graphic printed white on black. Also called dropout type.

Reverse kicker—A headline that appears above an article's primary headline, is larger than it, and supplements the primary headline.

Rough layout—Sketch giving general idea of size and placement of text and graphics.

Rubylith, Amberlith—Trade names for masking film used to block off black areas of a newsletter (for dropping in photos, etc.).

Rule—Line used for graphic purposes. Comes in different point widths.

Runaround—Type set to conform to part or all of the outline of a photo or illustration.

Running head or foot—Standard information that appears at the top or bottom of every page. Also called headers or footers.

Sans serif—Type without "feet" (small horizontal lines) on the ends of the letters.

Scale—To identify the percent age by which artwork should be enlarged or reduced.

Screen—Dots of uniform density that print a percentage of black or of a solid color.

Serif—A short crossline that completes a main stroke of a letter in some styles of type. Also a name for the styles of type that contain such strokes.

Show-through—Printing on one side of paper that can be seen on the other side.

Sidebar—Story or block of information related to and placed near an article.

Small caps—Capital letters that are about the same height as the height of lowercase letters.

Spec type—Short for specifying type. To use printer's terms to note to the typesetter how to set type.

Specifications—In printing, complete and precise descriptions of the features of a particular job.

Spread—Two pages that face each other. Also the layout of these pages.

Standing head (standing headline)—Headline whose words and position stay the same issue after issue

Style—The rules for treatment of capitalization, titles, numbers, and other such matters.

Thumbnail—A miniature, bare-bones sketch of the pages of a printed piece. Used in planning content, not the final look of the piece.

Typeface—A unique style of type that has its own characteristics. Examples are Bodoni, Chancery, Helvetica, News Century Schoolbook, and Times. Different type design houses may call the same typefaces by different names.

Typesetter—Machine that creates type. Also the person who uses the machine.

Typesetting—The process of making type camera ready. Done by a printer or typesetting house.

Type size—The height of a typeface measured from the top of its ascenders to the bottom of its descenders. Expressed in points. Because typefaces all differ in design, 10-point type in one type style may look larger than 10-point type in another.

Appendix D: Sources

For more information, consult the following publications.

***The Associated Press Stylebook and Libel Manual.* New York: The Associated Press, frequently updated.**

Used by the Associated Press, this manual provides standardization of style. This alphabetically organized guide contains rules on grammar, spelling, punctuation, and usage.

Beach, Mark. *Editing Your Newsletter.* 4th ed. Cincinnati, Ohio: Writer's Digest Books, 1995.

With sections covering planning, editing, writing, format, type, graphics, photography, design, layout, printing, and distribution, this informative manual is perhaps the best all-encompassing tool for newsletter production. Illustrations are plentiful.

Beach, Mark. *Getting it Printed.* Portland, Ore.: Coast to Coast Books, 1993.

Getting It Printed discusses how to work with printers and graphic arts services to assure quality, stay on schedule, and control costs. In addition to excellent layperson descriptions of technical printing processes and trade customs, the book contains a superb section on planning.

***The Chicago Manual of Style.* 15th ed. Chicago: The University of Chicago Press, 2003..**

Used by the University of Chicago Press, this manual is considered a standard reference for editors and authors. It contains a detailed discussion of the stages of manuscript preparation and of traditional grammatical terms. The list of proofreading marks is particularly useful. *Chicago* thoroughly covers grammar and style issues.

Grossmann, Joe, with David Doty. *Newsletters from the Desktop: The Desktop Publisher's Guide to Designing Newsletters that Work.* 2nd ed. Chapel Hill, N.C.: Ventana Press, 1994.

This informative guide to the do's and don'ts of newsletter design describes all the steps involved in making a newsletter, from planning to printing.

***The New York Public Library Writer's Guide to Style and Usage.* New York: HarperCollins Publishers, 1994.**

This reference contains rules on grammar, punctuation, and usage, techniques for avoiding sexist language, and desktop publishing basics.

Parker, Roger C. *Desktop Publishing and Design for Dummies*. Foster City, Calif.: IDG Books, 1994.

This book provides information on applying basic principles of desktop design to page-layout programs. A special section on newsletters includes such topics as planning a newsletter, newsletter layout and typography, and producing and printing a newsletter.

Parker, Roger C. *Looking Good in Print*. 3rd ed. Chapel Hill, N.C.: Ventana Communications, 1993. (Also available in Deluxe CD-ROM edition, 1996.)

Subtitled "A Guide to Basic Design for Desktop Publishing," this book covers the basics of design on desktop. Although it lacks highly technical information and how-to's about specific desktop programs, the book touches on the basics of graphic design. It includes elements of graphic design, organization techniques, information about type, and strategies for handling white space, color, photos, and small graphic elements. Designed for beginners, this book carries plentiful examples, and its organization makes it a quick read.

***Pocket Pal*. Memphis, Tenn.: International Paper Company, frequently updated.**

For generations, *Pocket Pal* has provided an introduction to the graphic arts for artists, designers, and editors. Highly technical, it presents the history of printing, introduces commonly used printing processes, deals with type fundamentals, and follows printing through its stages. Information about copy and art preparation, film, and inks helps editors in dealing with printers on their own terms. Its index of graphic arts terms is extremely useful. *Pocket Pal* is often available free through printers.

Strunk, William, Jr. and E.B. White. *The Elements of Style*. 3rd ed. New York: MacMillan Publishing Company, Inc., 1979.

The Elements of Style provides the rules and principles of precise writing in a short, enjoyable format. It contains the basic rules of word usage, elementary principles of composition, and a list of words and expressions commonly misused.

Appendix E: Statement of Purpose for Chapter Newsletters

Although each chapter newsletter's function reflects its local audience's needs and personalities, all chapter newsletters serve three inseparable public relations functions, all aimed at membership service and recruitment.

Information Sharing: Chapter newsletters exist to inform local APICS members. Without this crucial content, newsletters are only announcements and cannot recruit members.

Membership recruitment: As membership recruitment tools, chapter newsletters enable members and nonmembers to locate important chapter meeting dates and provide crucial chapter-related information. Because this information is time-dependent, newsletters should be published regularly, preferably once a month.

Image Building: Newsletters should present a professional, positive image of APICS, reflecting APICS' standing in the global marketplace.



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