

# **NEW PRESIDENTS REFERENCE MANUAL**

**AAOS OFFICE OF GOVERNMENT  
RELATIONS**

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## **ORGANIZATIONAL SERVICES OFFERED TO STATE ORTHOPAEDIC SOCIETIES**

**State Society Membership Manual:** A manual designed to assist state orthopaedic societies with membership development.

**State Legislative and Regulatory Affairs Manual:** A manual designed to guide orthopaedic surgeons through the state legislative and regulatory process.

**New Presidents Manual:** A manual designed to orient new Presidents of state orthopaedic societies with AAOS products, services, and other resources.

**State Orthopaedic Society Profile Information:** Information about each state orthopaedic society including the names of state society leaders, size of membership, amount of dues, and the date of the annual meeting.

**Monthly State Society Newsletter Articles:** State newsletter articles are sent by e-mail to assist state orthopaedic societies with newsletter development.

**State Society Grant Program:**

*The State Orthopaedic Society Assistance Fund* provides financial assistance to state orthopaedic societies for products, programs, and services to develop and organize the society.

**Model State Society Program:** This program describes the organizational components of a successful state orthopaedic society.

**State Societies Strategy Meeting:** An annual training program for state society leaders and executive directors on state legislative and organizational issues.

**Executive Directors' Luncheon:** An annual luncheon for state orthopaedic society Executive Directors. This luncheon provides Executive Directors an opportunity to discuss issues and network with other Executive Directors.

**Executive Directors' Conference Call:** A monthly conference for state orthopaedic society Executive Directors to discuss important legislative and organizational issues.

**The Executive Director of the Year Program and The State Orthopaedic Society of the Year Program:** An annual award presented to an Executive Director and State Orthopaedic Society recognizing their accomplishments.

**Exchange Information Between States:** Share useful information or products developed by a state society with all other state orthopaedic societies.

**Develop Products to Assist State Orthopaedic Societies:** Determine the needs of state orthopaedic societies and develop products, programs, and services to assist them.

## **ADVOCACY SERVICES OFFERED TO STATE ORTHOPAEDIC SOCIETIES**

**Legislative Strategy Development:** State legislative strategy development based on best practices, opposition tactics and the state society's unique strengths is provided to state orthopaedic societies confronting legislative issues.

**State Legislative Tracking:** State legislative and regulatory tracking is conducted at the national level to monitor trends and identify bills and proposed regulations of interest to individual states.

**Legislative Alerts:** Periodic alerts concerning bills and regulations requiring a response from the orthopaedic community are sent to state societies as necessary.

**Weekly Bill Status Reports:** Customized weekly bill status reports are available to each state orthopaedic society informing state society leaders of legislative action in their state.

**State Legislative Updates:** A summary of action on state legislation affecting orthopaedic surgeons across the country is sent to state orthopaedic societies and published in *AAOS Now* on a quarterly basis.

**Advocacy Resource Development:** Legislative materials including fact sheets, position statements, talking points, visual aides and other useful information are developed on an ongoing basis and made available through the AAOS website. Upon request, materials may be produced and tailored to meet the specific needs of individual states.

**Legislative and Regulatory Research:** Research assistance such as data collection and case study development on legislative and regulatory issues is available to state orthopaedic societies.

**Lobbying Assistance:** The AAOS is available to advise states on the hiring, management and evaluation of state society lobbyists.

**Grassroots Development:** Assistance in developing strategies to mobilize state society members for advocacy efforts is offered to state society leaders.

**Model Legislation:** Model legislation is sent to state orthopaedic societies prior to the start of each legislative session to facilitate proactive advocacy efforts.

**Coalition Building:** Assistance in developing contacts and forging legislative coalitions with other state health care groups is provided to state societies seeking to broaden their government relations programs.

**Financial Assistance:** Financial assistance to state societies engaged in advocacy efforts is available through the *State Orthopaedic Society Health Policy Action Fund*. The AAOS also assists state societies in identifying external sources of financial support.

# **RECOMMENDED MODEL STATE SOCIETY PROGRAM**

## **RATIONALE:**

In an effort to assist State Orthopaedic Societies in establishing their structure and identifying activities which may benefit them, the Board of Councilors Committee on State Orthopaedic Societies is developing a recommended “Model State Society” program. This program is designed to help state orthopaedic societies function more efficiently and benefit from other states’ experience.

Some of the recommended activities are identified with an \* indicating that these are fundamental activities in the creation of a state orthopaedic society and in its operation in which all state orthopaedic societies should participate. Other recommended activities are just that – recommendations which will enhance the activities of your state orthopaedic society. These recommended activities would serve as a basis for each state to evaluate its own activities in conjunction with other states.

The Board of Councilors State Orthopaedic Societies Committee is interested in ultimately developing a mechanism to recognize those societies which are achieving excellence in their state societies or developing innovative programs which will further enhance state orthopaedic societies.

# **RECOMMENDED ACTIVITIES FOR A MODEL STATE ORTHOPAEDIC SOCIETY**

## **MEMBERSHIP:**

- \*1. 80% of the physicians and surgeons in that state who practice at least 90% of their professional activities, clinical or administrative, in the field of orthopaedics, as defined by the individual state orthopaedic society or the by-laws of the American Academy of Orthopaedic Surgeons, belong to the State Orthopaedic Society

Or;

the State Orthopaedic Society is able to annually increase its membership of eligible physicians and surgeons as defined above, by 5% from the previous year with a stated goal of having at least 80% of the orthopaedic surgeons in the State as members.

- \*2. The state society develops, implements, and maintains a program to recruit and retain membership. This would include regular membership, resident participation, retired orthopaedic surgeons, military orthopaedic surgeons and academic orthopaedic surgeons.
- 3. The state orthopaedic society to work with the American Academy of Orthopedic Surgeons to develop a mechanism for the Academy to encourage fellows to join their state societies. The Academy will provide a list annually for the state societies.

## **MEETINGS:**

### *State Meetings*

- 1. The state orthopaedic Society holds the following meetings each year:
  - 1) One business meeting.
  - 2) One scientific meeting.
  - 3) One socio-economic meeting.

These can be held at the same time or in conjunction with another meeting of an orthopaedic organization, if the leadership of the state orthopaedic society feels it would be beneficial to their membership.

- \*2. Governing body of the state society convenes at least three times per year. The governing body is the Board of Directors, Executive Committee or similar committee of the state orthopaedic society.
- 3. A state orthopaedic society member attends and actively participates in the state medical society meetings.

4. The state orthopaedic society interacts with academic orthopaedic programs in its state to promote resident research and encourage resident participation in the state orthopaedic society.

### Academy Meetings

- \*1. State societies have at least one representative (in addition to the representative to the American Academy of Orthopaedic Surgeons Board of Councilors) attend the following Academy meetings:
  - National Orthopaedic Leadership Conference
  - State Legislative Strategies Meeting
  - Annual Meeting
  - State Orthopaedic Societies Forum

### **COMMUNICATIONS:**

1. Society newsletter, letter from the President, or written communication from the state society is distributed to the entire membership at least three times per year.
2. State society develops and maintains a “Home Page” on the World Wide Web. This home page should include a link to the American Academy of Orthopaedic Surgeons “Home Page” and may be in conjunction with the state medical society “Home Page”. If in conjunction with the state medical association, the state orthopaedic society should have its own section with information specific to the state orthopaedic society. The American Academy of Orthopaedic Surgeons to develop a generic Web Page which can be easily customized to a specific state.
- \*3. A report of the American Academy of Orthopaedic Surgeons Board of Councilors representative is provided at state society meetings. This could also be included in the Society newsletter.
4. Communication between members is encouraged by providing a directory of its members. The directory should contain the members' phone and fax numbers and e-mail addresses if available.
5. The state society pursues communication with other musculoskeletal groups such as BONES, NAON, MGMA and other organizations impacting musculoskeletal care such as insurance companies and workers compensation firms.

### **ORGANIZATIONAL STRUCTURE:**

- \*1. The state orthopedic society develops a written set of by-laws which, at a minimum, discusses its purpose, focus, and committee structure. (The American Academy of Orthopaedic Surgeons to provide model by-laws from other state orthopaedic societies upon request.)
- \*2. State society develops and/or updates a strategic plan for the organization. This plan may be developed by the governing body and ratified by the general membership. (The American Academy of Orthopaedic Surgeons to provide a

sample strategic plan and procedure, which would be furnished to states upon request.)

- \*3. The state orthopaedic society retains an employee in the position of executive director, society liaison or similar position. This position may be full or part-time and the employee could also be an employee of the state medical society.
- \*4. An American Academy of Orthopaedic Surgeons Board of Councilor representative is a member of the governing body of the state orthopaedic society. The governing body includes the Board of Directors, Executive Committee or similar committee of the society.
- 5. A society member currently holds a position on a state medical society committee or their board of trustees and provides reports to the governing body of the state orthopaedic society. This report should be on the meeting agenda for that body.
- 6. The society maintains an active legislative committee.
- 7. Encourage a member of the state orthopaedic society to become a delegate to the American Medical Association either representing their specialty or hospital.
- 8. The society encourages the executive director/liaison to attend educational opportunities which will enhance their understanding of issues surrounding orthopaedics, legislation, and/or association management.
- \*9. The state society obtains legal oversight of their activities when appropriate.
- \*10. State Orthopaedic society is encouraged to submit resolutions to the American Academy of Orthopaedic Surgeons through their Board of Councilor(s) on issues important to their state.

### **POLITICAL ACTION:**

- \*1. The society proactively lobbies legislation/regulations which impact musculoskeletal care to their patients and the practice of orthopaedic surgery. This would include introducing legislation or opposing onerous legislation/regulations.
- \*2. The society develops and maintains a network of orthopedists/orthopaedic office managers to advocate the society's position on legislative/regulatory issues. (Key Contact program).
- 3. State societies develop and participate in patient coalitions on musculoskeletal care and issues related to orthopaedic surgeons.
- 4. If allowed by the society by-laws the society maintains a state orthopaedic political action committee (PAC) or encourages orthopaedic contributions to legislative candidates.

5. State society sponsors or participates in “Lobby Day” or a similar event held at the state capitol. This may be in conjunction with the state medical society meeting.
6. State society coordinates its legislative activities with the state medical society.

**MISCELLANEOUS:**

1. The society coordinates/participates in an “Orthopaedic mini-internship” program for elected officials, and other community leaders as the state orthopaedic society deems appropriate.
2. The society develops other special programs or studies to improve the practice of orthopaedic surgeons in their state. Such programs might include:
  - Manpower studies
  - Public Education Programs
  - Scoliosis Screening
  - Sports Physicals
  - Special Olympics
  - Playground Build
3. State society to work with consumer groups with musculoskeletal problems to promote and protect appropriate musculoskeletal care and research.
4. The state society participates in programs to raise money for Orthopaedic Research and Education Fund (OREF).

# **BOARD OF COUNCILORS**

## **STATE ORTHOPAEDIC SOCIETIES ASSISTANCE FUND**

### **Background**

The American Academy of Orthopaedic Surgeons State Orthopaedic Societies Assistance Fund was proposed by the Board of Councilors State Orthopaedic Societies Committee, and is funded annually by the Board of Directors. The fund is designed to help state orthopaedic societies develop and implement programs which will promote the goals of the American Academy of Orthopaedic Surgeons and the society.

### **Procedures**

Applications will be reviewed by the Board of Councilors State Orthopaedic Societies Committee; a recommendation will be made to the Board of Councilors at its next meeting. State orthopaedic societies receiving grants from the American Academy of Orthopaedic Societies Assistance Fund should provide the Board of Councilors State Orthopaedic Societies Committee a written status report in the Spring and Fall following the awarding of the grant.

If your state orthopaedic society is interested in applying for a grant, please return the completed application to:

*Susan A. Koshy, JD, MPH*  
American Academy of Orthopaedic Surgeons  
6300 North River Road  
Rosemont, IL 60018  
Fax: 847-823-7268

# STATE ORTHOPAEDIC SOCIETY ASSISTANCE FUND

## Request For AAOS Financial Assistance With Legislative Activities

### CRITERIA

**CRITERION 1: National Relevance of the Issue or Project**

**ISSUE:** The committee will review the issue/project for its impact on the specialty of orthopaedics nationally as well as its potential usefulness and relevance to other state orthopaedic societies.

**CRITERION 2: Assessment of Chances of Success**

**ISSUE:** The committee will review the reasonable chance of success or completion of the described issue/project.

**CRITERION 3: Facts and Data Which the Academy Can Support**

**ISSUE:** The committee will review the issue/project to determine whether the results or data collected will be beneficial to the practice of orthopaedics and state orthopaedic societies.

**CRITERION 4: Sharing of Results**

**ISSUE:** The requesting society should be willing to provide a report to all state orthopaedic societies on how the project was completed and detailing its results.

**CRITERION 5: Requesting Society**

**ISSUE:** The requesting state orthopaedic society should not have previously requested financial assistance within six months, in order to allow for a wider national distribution of available funds.

**CRITERION 6: Reporting**

**ISSUE:** State Orthopaedic Societies receiving grants from the American Academy of Orthopaedic Surgeons financial assistance fund are required to provide the Board of Councilors State Orthopaedic Societies Committee two written reports, in a detailed format, three weeks prior to the next Board of Councilor meeting. The reports must include an explanation of all grant expenditures and any unused grant monies must be returned to the AAOS.

Upon the completion of the grant project, a final “project summary” must be provided reporting the results of the project as well as the pros and cons of completing the project. The report must be detailed and the Academy must be able to share the report with all state orthopaedic societies.

## **PROCEDURES**

1. The requesting state orthopaedic society must submit a written request for financial assistance directly to the American Academy of Orthopaedic Surgeons' Office of Government Relations. A detailed description of the issue/project, the position of the state society and the desired outcome, should be included with the request. An adequate amount of lead time should be provided for the Office of Government Relations and the Board of Councilors State Orthopaedic Societies Committee to complete its review.
2. The AAOS Office of Government Relations will compile and present all information pertinent to the criteria to the BOC State Orthopaedic Societies Committee. The Office of Government Relations may formulate a recommendation for discussion by the Committee. Recommendations may include approval for disbursement of funds, approval contingent upon further elaboration of items in support of criteria, or rejection of request for disbursement of funds.
3. The Office of Government Relations shall transmit the decision of the BOC State Orthopaedic Societies Committee to the requesting state orthopaedic society. If the decision is to approve the disbursement of funds, a request to the Academy's Division of Finance and Administration will be made at that time.
4. The requesting state orthopaedic society is required to keep the American Academy of Orthopaedic Surgeons Office of Government Relations informed of its progress on the issue/project. Two reports detailing progress and the outcome of the project must be submitted to the Board of Councilors State Orthopaedic Societies Committee.

Upon the completion of the grant project, a final "project summary" must be provided reporting the results of the project as well as the pros and cons of completing the project. The report must be detailed and the Academy must be able to share the report with all state orthopaedic societies.

# BOARD OF COUNCILORS

## STATE ORTHOPAEDIC SOCIETY Request For AAOS Financial Assistance

### APPLICATION

Name of Society: \_\_\_\_\_

Date: \_\_\_\_\_

1. Description of project \_\_\_\_\_

2 Predicted Impact of Project \_\_\_\_\_

3. Please attach a project budget. \_\_\_\_\_

4. Contact person for questions on this application:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

\_\_\_\_\_  
Signature: President of State Orthopaedic Society

\_\_\_\_\_  
Signature: Board of Councilor (Only one BOC signature is required)

**Return this form to Susan A. Koshy, JD, MPH  
Manager, State Society Affairs  
AAOS, FAX (847) 823-7268**

# BOARD OF COUNCILORS

## STATE ORTHOPAEDIC SOCIETY Request For AAOS Financial Assistance

### REPORT FORM

State Orthopaedic Societies receiving grants from the AAOS assistance fund should provide the Board of Councilors State Orthopaedic Societies Committee a written status report three weeks prior to the next Board of Councilors meeting.

Name of Society: \_\_\_\_\_ Date: \_\_\_\_\_

Name of Person Completing Report: \_\_\_\_\_

Name of project: \_\_\_\_\_

Date funding was awarded: \_\_\_\_\_ Amount of funding: \_\_\_\_\_

Describe the progress of the funded project:

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What expenditures from the AAOS assistance fund have been made?

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Has the project been completed? \_\_\_\_\_

If no, describe next steps in the project.

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Return this form to Susan A. Koshy, JD, MPH  
Manager, State Society Affairs  
AAOS, FAX (847) 823-7268

## Website Best Practices

The following guide was developed by the Board of Councilors State Orthopaedic Societies Committee to assist state orthopaedic societies in developing their own site on the World Wide Web. This information is meant to be a guide and consists of some information from expert sources and also from several state orthopaedic societies own experience developing their sites.

Two active state society leaders have agreed to serve as a resource for simple questions when creating your website. These people have all created websites for their state societies and will be happy to offer what help they can, but should not be considered a main source for assistance, but rather a source for simple and quick questions.

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Texas Orthopaedic Association  
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Austin, TX 78701  
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**Diane Przepiorski**  
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Phone: (916) 454-9884  
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E-mail: [coal@pacbell.net](mailto:coal@pacbell.net)  
Website: <http://www.coassn.org>

### **About Web Pages**

Your website can be an additional tool for your members of your state orthopaedic society. The website can act as a disseminator of information, a link to other important sites, and an opportunity to have access to the services and items your society offers its members. The website can also act as a clearinghouse of “quick information” for your members such as legislative alerts or details about your annual meeting.

Here are some basic characteristics of a web page:

Address: or URL, (Universal Resource Locator). This is the place where visitors locate your website on the world wide web.

Domain name: The unique name that identifies each Internet site (i.e. www.aaos.org)

Home Page: The title page of your website. This where visitors to you site can access your page and the items offered.

Links: A connection to another link on the web. When users click on a link, their browser will retrieve and display the contents of the target page.

Internet Service Provider (ISP): A company that provides access and authorization to a web server.

Web server: The computer that stores and displays your website to the Internet. The server transmits your website information to the Internet when it is contacted.

HTML: Hyper Text Markup Language; the programming language used to create web pages.

### **Planning Your Website**

Planning your website is probably the most important step in the construction and design process. There are several questions to ask when determining what your website will consist of.

Because the web is not a traditional publication, there are several different rules regarding readability and design that are necessary to consider when you are planning your website. The following six items are good ideas to keep in mind:

- 1) Smaller is Always Better - Items need to be faster (and smaller in size) to load so that your audience does not have to wait long for information on your site, and items such as logos need to allow visitors to view important information without scrolling down.
- 2) Strive for Simplicity - Keep the colors of your website simple, keep the design elements fairly uniform as you move through pages on the website, use advanced techniques such as sound and movement sparingly and only when appropriate.
- 3) Build Visual Contrast into Each Page - Text should extend from one end of the screen to another because it is too hard to read, solid background colors from left to right and top to bottom are boring, create a zone of interest with another color in the area where your navigational links are located.
- 4) Put the Important Items First - Important items should be easier to locate, significantly larger and perhaps highlighted with color.
- 5) Choose a Limited Color Palette - using fewer colors helps to achieve uniformity in your website.
- 6) Make Navigation Intuitive, Obvious, and Fast - Make sure information on your website is easy to locate, and don't make visitors wait for a long time to load complicated graphics.
- 7) Visit Other web sites - Take the time to look at similar web sites and keep a record of what you like and don't like in their sites. These items will help you in planning your site.

Source: Guide to Web Component and Design, Roger Parker

Another item to consider when designing your website is exactly what your members want to see on a website. Consider the primary purpose of the website, the goals of the website, and any possible actions you may want your members to take when they visit your site. It is also important to consider who you want to visit your website (i.e. general public, members only, allied providers, nurses), what type of information are your visitors looking for, and how often do you want your visitors to return. Finally, you need

to consider how you are going to promote your website, where you are going to list your website, and what links you would like to provide on your website.

### **Designing Your Website**

When designing your website, it is important to keep your audience in mind. Make sure you include information that is useful to them and that you also give them a reason to come back often.

Keep in mind that the top half of your page will draw visitors into your page and make them curious as to what information is on the page. The top half of your page should also be uniform as you switch from page to page in the web site.

It is also important to plan the links that you will use on your web site. These should allow your visitors to go to another section of your site more quickly or perhaps lead them to another web site that may be related to your web site. Links should be as obvious as possible on your website through the use of icons, clip-art, or colors to draw your visitors to them. There are numerous ready-to-use sources of buttons, icons, and clip-art. Most web site authoring software contains dozens -or hundreds- of ready-to-use icons and buttons. These links are often what keep visitors returning and should be updated and tested often to make sure they are working properly.

There are two types of text that is available on the web site: tagged and formatted. Tagged text is the text that immediately downloads and is formatted according to the defaults chosen by the web site browser. With this text you do not have control of the specific typeface or type size used to display the text because different browser's project the images differently. Formatted text is text that has been saved as a graphic file and downloads as a graphic. The advantage to this type is that you have absolute control of its appearance, but the text must be downloaded when you arrive at the website. This may take time depending on how many colors are used and the size of the text. Depending on the time it takes, a visitor may become disinterested in your site. This type of graphic text is best used in titles, headlines, or subheadlines.

The layout of text on your web site is also very important. Unlike in print media such as newspapers or magazines, it is very difficult to read items that stretch across the page on a website. Readers tend to prefer shorter articles that are produced in a column format. Keep in mind that readers tend to prefer to scroll down rather than across. You should also keep descriptions of items that are available on your web site short and to the point. If the reader is truly interested, include a link to that item where they can read the document in its entirety. When choosing text that will go on your website, one of the

best ways to organize your web site content is first to write down everything you want to communicate, and then go back through your first draft and insert subheads every two or three paragraphs. This will give you an idea of what links to other text you should use on your page.

Color is also a crucial element in designing a website. Unlike print media where the use of color always costs extra, the use of color is of no cost on the web, but that does not mean that it should be used liberally. Color should evoke an image that your site is trying to portray and should be used sparingly and in cases where it makes good sense. Subdued colors and lightly patterned backgrounds tend to be well-received.

In order to maintain some continuity it is important to keep the same text color throughout the entire website, then visitors will not be disoriented when they link to another portion of your site. Also avoiding bright solid-colored backgrounds like reds, yellows, oranges, or greens crucial because large doses of these colors can be very tiring on the eyes.

The use of tables, frames, and graphics can also attract visitors and draw them to your site. Consider placing some of your information within these design tools as another way to make your web page more attractive.

You also may want to consider adding a participation portion for your audience on your website, this could be an on-line survey of your membership (you need to be sure to publish the results), a registration form for your annual meeting, or simply offering your members e-mail contacts on different topics that they could correspond with. By involving your visitors in the site you will keep them returning often.

### **Producing your web site**

When it comes time to produce your website, you need to determine exactly how it will get done. There are two options you can pursue. The first is to hire an outside designer. This person may be part of the package that your internet service provider offers or they may be a freelance designer. The other option is to purchase a web authoring program such as Front Page 97.

When hiring an outside designer, you need to consider several factors as you would anytime you are hiring an outside contractor to complete work for you. It is important to discuss with the designer, the level of experience that they have. You do not want to pay them to learn about how to design a web site no matter how much print media experience they may have. Also, because the web is slightly different from magazines and newspapers, you want to make sure the designer is sensitive to this and allows for this. You should also ask to see copies of other work that the designer has completed. Visit the web sites and compare them to how you would like your to look. Finally, be sure to ask for references from past clients and ask questions about timeliness of work, working relationships, and the result of the final product. Ask the designer to give you a proposal with timelines and costs and make sure they stick to it.

### **Obtaining Web Space**

Choosing a place for your website is also an important decision. You need to make sure that your Internet Service Provider allows the website to be accessed 24 hours a day so people browsing your web site can access it whenever you like. The cost of web space varies dramatically depending on where you live. In the San Francisco Bay Area, quite a few Internet Service providers offer 5MB to 20MB of free space with Internet accounts that only cost \$20 a month while in other areas, its common to pay \$50 to \$75 per month for an account plus an extra sum for web space.

Once you find a space for your web site you will also have to choose a domain name for your web site. To get domain name, you have to register it with an organization called InterNIC (<http://www.internic.net>). There is a registration fee of \$100 for the first two

years and an annual fee of \$50 after that. Many Internet Service Providers will handle the registration process for you, although they usually charge something for the service.

### **Promoting Your web site**

Before you have your web site established you should discuss how you are going to promote it. Publishing it in your newsletter or sending out a special notice to your members are two good ideas to start with. You should also consider publicizing it in the hospitals in your state, with the state medical society and also by linking it to the Academy's Home Page. You can also take advantage of a free service on the web called Submit it! (<http://www.submit-it.com>). This service submits information about your site to a number of search services on the web.

### **Maintaining your web site**

Once your web site is running, you need to pay careful attention to the information that is posted on it. The information must be timely and correct if you want your visitors to return. By providing this type of information, word will spread about your site and your number of visitors will grow. Conversely, if the information does not change often and is often out of date, people will stop visiting. In your planning make sure that you designate someone to periodically test the features of your web page to make sure that they are working. Also, find someone to make the easy updates and changes on your site or do it yourself with one of the web authoring programs described below.

### **Web Authoring Programs**

The web authoring programs have become increasingly friendly to use, and are not tough to understand even for a person with limited computer knowledge. There are several different types of web authoring programs, some of which require you to have a knowledge of HTML and others which allow you to operate largely in a desk-top publishing type of program. Other also offer a happy medium allowing you some access to HTML codes, but also offering most of its services in a more friendly format. We will focus on programs that do require little or no knowledge of HTML.

The following web authoring programs were rated in the January 20, 1998 issue of *PC Magazine* based on both power and ease in the following categories: simple page creation, complex page creation, and site management.

According to *PC Magazine*, the following were the definitions of these categories:

Simple page creation - In this category we rate basic HTML page building. For ease, we look at items such as: Can you build a page by dragging objects onto the page and typing in as a word processor? Programs that offer good templates and wizards, an intuitive interface, and good documentation receive higher scores. In the power area, we look for standard Level 2 HTML support, such as simple headings, body text, pictures, and links to other pages, as well as "mail to" support. Programs that offer more flexibility in designing pages, with an emphasis on importing word processing formats and automatic graphic conversion score higher. The ability to import from the Web and the inclusion of a disk of clip art, samples, and templates are also helpful.

Complex page creation - refers to more significant web site building. Programs that includes support for building frames, tables and forms improves the ease rating. Wizards for constructing frames, tables, forms, and image maps contribute to both ease and power

ratings. In the power category, we look for full support for HTML 3.2 and both Microsoft and Netscape extensions. We give higher scores to programs that let you add items such as Java and Java Script. We also consider how well tools support general code editing such as verifying links and checking HTML syntax, matching tags, and other error conditions.

Site management - Once you've built your page, you'll need to post-it. Site management power ratings reflect built in FTP-loading or HTTP support for publishing directly to your web server. Better programs let you download existing sites, compare them with your local working copy, or both. We give extra power points if the product can update only what has changed and lets you work live on the site. Graphical site mapping, creating site-wide styles, and making global changes are also valuable. We consider both power and ease in link management. Programs should be able to convert local-based links to server-based links and then be able to verify their accuracy after publishing.

## POWER

## EASE

Computer Program	POWER			EASE		
	Simple page creation	Complex page creation	Site management	Simple page creation	Complex page creation	Site management
Adobe Page Mill (\$100)	Good	Fair	Fair	Fair	Good	Good
Atrax The Web Publisher (\$99.95)	Good	Fair	N/A	Good	Fair	N/A
Drumbeat (\$699)	Good	Good	Fair	Good	Good	Good
Home Site (\$89)	Excellent	Excellent	Good	Excellent	Good	Good
HotDog Professional 4 (\$129.95)	Excellent	Excellent	Fair	Fair	Good	Good
HoTMetal PRO (\$129)	Excellent	Excellent	Good	Excellent	Good	Good
HTML Assistant Pro 97 (\$99.95)	Good	Fair	Fair	Good	Fair	Good
HTMLed Pro 32 (\$59.95)	Fair	Fair	Fair	Fair	Fair	Fair
Macromedia Dreamweaver (\$300)	Excellent	Excellent	Fair	Excellent	Excellent	Good
Microsoft Front Page 98 (\$149)	Excellent	Good	Excellent	Excellent	Excellent	Excellent
Net Objects Fusion (\$300)	Excellent	Good	Excellent	Excellent	Excellent	Excellent
Quick Site (\$149.95)	Fair	Fair	Fair	Fair	Poor	Poor
Visual Page (\$80)	Fair	Fair	Fair	Good	Good	Good
WebberActive (\$149)	Good	Good	Fair	Good	Fair	Fair
WebEdit PRO (\$89.95)	Good	Good	Fair	Fair	Fair	Good

## **Guidelines for Developing a Newsletter**

### **5 steps to produce a successful publication**

#### **Step 1: Define the purpose**

- A. The purpose of your newsletter should be defined as specifically as possible. Is the newsletter's purpose to keep your readers informed; to educate on matters relating to your mission or industry; to market your services or products; or to enhance public relations with your readers?
- B. Identify your audience and know what your readers want and need. Strong newsletters offer specialized information to a specific group of readers. To help identify your audience and the goals of your newsletter, answer the following questions.
  - 1. Who are you readers?
  - 2. What do they need to know?
  - 3. How will they benefit from your newsletter?

#### **Step 2: Establish the format**

- A. Create a nameplate (name of the newsletter)
  - 1. Do not use "newsletter" or "the" in the name.
  - 2. Add a tag line or subtitle.
- B. Make sure the newsletter design fits your organization's image. Should your newsletter be informal, formal, classical or modern? The typefaces you choose and the photographs and graphics you use all contribute to this image.
- C. Establish repeating elements, or departments, for each issue.
  - 1. Departments unify the newsletter and allow readers to quickly locate desired information. Examples of departments include a list of new members, legislative updates, president's message, calendar of events, letters to the editor, job opportunities, etc. A department is something your readers will expect to see in each issue. In many newsletters, a department is assigned to a specific part of a specific page.
  - 2. After you determine the departments, you may want to assign a word count to each one. By doing so, authors and contributors will know exactly how long their articles need to be which allows you to design a newsletter template making it easier and faster to "flow" copy.

- D. One of the hardest aspects of a newsletter is filling the pages with timely, audience-specific content. The following are sources for articles.

Meetings	Reprints from other publications
Speeches	Letters to the editor
Lawmakers	Original articles from interviews
Industry white papers and reports	Freelance writers or staff writers
Press releases	Member contributions

- E. Determine the frequency of publication: quarterly, monthly, bimonthly, semi-annual. Also decide when you'll publish at the beginning, middle or end of the month. What additional factors may affect the time of publication?
- F. Determine the number of pages. Many newsletters are four pages. (One 11"x17" sheet folded in half.) Four page newsletters are probably the easiest to do in-house and may be duplicated using high quality equipment, like a Docutec. You may want to establish a range of pages depending on your objectives, budget, staff size, and amount of content. If offset printing, however, the number of pages must increase by increments of four.  
*Helpful Hint* If designing in-house, never have copy extend from margin to margin. This decreases readability. For best results, always use two or three columns and a grid to layout the newsletter.
- G. Decide how many colors will be used. Keep in mind that three and four color printing is very expensive. Also determine the quality of paper you'll want to use. Ask a printer for samples. Determining the "shelf life" of your newsletter once in the readers' hands will help you select the appropriate grade of paper.
- H. Determine quantity to be printed.
1. If your membership is growing, will you need to maintain back issues? Will you mail to anyone other than your members, i.e. vendors, legislators, business professionals?

### Step 3: Develop a budget

- A. Answer the following questions to help develop your budget.
1. Will you employ freelance writers?
  2. Will you hire a graphic designer for layout and design or will the newsletter be designed in-house? If in-house,
    - a) do you have a page layout program?
    - b) does your computer have ample memory?
    - c) do you have a wide selection of typefaces?
    - d) do you have access to a scanner to reproduce photographs?
    - e) do you have access to the Internet to send files to a printer?
  3. Will you be hiring an editor or proofreader?
  4. Will you need to purchase photographs or special art?
- B. Now determine the fixed and variable costs.
1. Fixed expenses include writing, layout and design, administration/overhead, writing, copyediting, proofreading
  2. Variable costs include paper, printing, mailing and postage.

## Step 4: Establish and adhere: to art editorial calendar

- A. After you've determined the publication timetable, create an annual editorial calendar listing each publication date, major issues or features to be covered and all departments. If using freelance writers or volunteer contributors, determine who will be responsible for obtaining or writing the articles, and most important, indicate the due date for article submission. If publishing a reprinted article, determine who will be responsible for securing copyright permission.
- B. Once the major issues or topics have been determined, set the deadline date for article submission. From start to finish, you'll need to allow one to two weeks for copyediting depending on the size of your newsletter, at least five to seven days for layout and design; two days for proofreading; a minimum of seven business days for printing two days for labeling and mailing; and three to five days mailing time depending on the class of service you use.

By using an editorial calendar you will be able to see, in a quick, organized fashion, the content you'll be covering for a year. This will help you to track issues and topics to be covered and make any appropriate adjustments. The following is a sample editorial calendar.

Issue Date	Major Issue	Author	Due Due
January	New CPT Codes	I- Smith	Nov 15
April	Medical practice efficiency Annual conference information	D. Haines P. Wilson	Feb 15
July	Conference highlights Determining physician compensation	P. Wilson T. Wolfe	May 15
October	Merging your practice	P. Cole	Aug 15

## Step 5: Establish a production schedule

- A. In addition to the editorial calendar, a production schedule is a must to help get your newsletter out on time. Create a chart with the following tasks and indicate the responsible person and a deadline date.
  1. Define major issues and department content
  2. Collect information and articles
  3. Write articles
  4. Copyedit or copy fit articles
    - Check spelling, grammar and sentence structure. Don't rely solely on a spell checker.
  5. Choose photos or art

*Helpful Hint.* Make sure when using photos of individuals that their eyes are not directed off the page. This decreases readership. Have the eyes of individuals look in or directly at the reader.
  6. Write headlines/subheads/photo captions
    - Make sure headlines relate to the story. Use at least one verb in the headline.
    - Photo captions are usually read before story text

7. Layout and Design
  - If a novice to layout and design, the book, Design Principles for Desktop Publishers by Tom Lichty is an excellent reference. b) If using a designer, make sure he or she understands your organization's image.
  - If designing in-house, keep fonts to a minimum. Only use two or three complimentary typefaces for headlines, subheads, and body copy. Add these typefaces to your style sheet
  - Make sure you use a lot of w
8. Proofread
  - Proofreading is different from copyediting. Copyediting concentrates on style where proofreading focuses on accuracy. Proofread a printed, final copy and check for typographical errors. Try to have someone else proofread your newsletter, if possible. Check to make sure the right caption is with the right photo. Verify that the type is consistent in each element (headlines, subheads, captions, etc.) Observe the spacing between headlines and body copy and subheads and body copy. Check the spelling of names, and verify any dates or phone numbers.
9. Produce proofs
10. Approve proofs
11. Print
12. Order mailing labels
13. Mail/distribute

### **Additional Helpful Hints:**

- Begin collecting newsletters and review them for style, layout, graphic images, type, paper, color, etc.
- If new to layout and design, select a software program with a "newsletter wizard". Microsoft Word 97 has an excellent wizard with three newsletter layouts from which to choose.
- Create a style sheet With rules for capitalization, abbreviations, numerals, etc. specific to your organization.
- If you choose to hire a graphic designer, review the designer's portfolio and make sure he or she has experience working with small staffs, volunteer committees, and short turn-around deadlines. For a small publication, independent designers work best and offer excellent customer service.
- Overestimate the time it will take to produce your newsletter.
- Contact writers and volunteer contributors often for progress reports.
- If you're short on copy and long on space, "filler" articles are available from the following sources:

The Copywriter  
 Narrative Strategies  
 (617)661-1839  
 Pages  
 Berry Publishing  
 2611 (312)222-9245

Clip Edit  
 Dartnell Corp  
 (800)621-5463  
 Ideas Unlimited  
 (800)345-

## **Suggested Readings**

- Books on newsletters include *The Newsletter Editor's Desk Book*, *Newsletters from the Desktop*, *Producing a First-Class Newsletter*, *Fundamentals of Successful Newsletters*, *How to create Powerful Newsletter*, *Marketing with Newsletters*.
- Books on layout and design include *Editing by Design*, *Desktop Publishing*, *Design for Dummies*, *Looking Good in Print, Type & Layout*
- Every newsletter editor should have a copy of the Associated Press' *Stylebook and Libel Manual* or *The Chicago Manual of Style*.

## **Suggested Graphic Designers**

Linda Gebhardt  
Gebhardt Kraus &  
Associates, Inc.  
4209 North Pulaski Road  
Chicago, IL 60641  
1648 (773)6045222

Carol Neiger  
NeigerDesignInc.  
1104 Asbury  
Evanston, IL 60202  
(847)328-

# Newsletter

## Continuing Articles across Pages

*Type your sub-heading here*

### Your By-line

Your Company Name

This document was created using linked text boxes, which allow articles to flow continuously across pages. For example, this article continues on page two, while the one to the right continues on page three. When you add lines of words to a text box, the words in the following text box flows forward. When you delete lines of words from a text box, the words in the next text box moves backward. You can link several text boxes in an article, and you can have multiple articles in a document. The links do not have to occur in a forward direction.

## Inserting Linked Text Boxes

To insert linked text boxes in a document, click Text Box on the Insert menu. Click and drag in your document where you want to insert the first text box, and insert additional text boxes where you want the text to flow.

## INSIDE THIS ISSUE

- 1 Continuing Articles across Pages
- 1 Instructions for Using this Template
- 4 Inserting and Editing Pictures

## Instructions for Using This Template

*Type your sub-heading here*

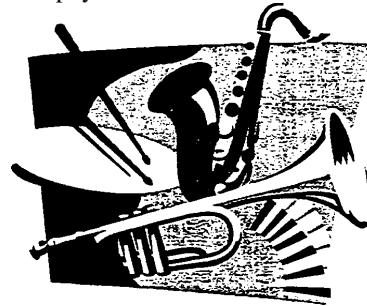
### Your by-line

Your Company Name

To keep these instructions, choose Print from the File menu. Press Enter to print the template. Replace the sample text with your own text to create your newsletter.

## Using Styles in This Template

To change the Style of any paragraph, select the text by positioning your cursor anywhere in the paragraph. Select a Style from the drop-down Style list at the topleft of your screen. Press Enter to accept your choice.



*See Page 4 to learn how to edit or replace this picture.*

The styles available in this template allow you to change the look of your headlines and other text. The following is a list of some common styles and their uses.

**Body Text** - Use this style for the regular text of an article.

**Byline** - Use this style for the name of the author of an article.

**To select the first text box, move the pointer over the border of the text box until the pointer becomes a four-headed arrow and then click the border. Click the right mouse button, click Create Text Box Link and then click in the text box where you want the text to flow. Repeat these steps to create links to additional text boxes.**

In the first text box, type text that you want. As the text box fills, the text will flow into the other text boxes that you've linked. To let the reader know that an article will continue on another page, insert a small text box under the text box, choose the Jump To style, and then type the words "Continued on Page." Click Cross-reference on the Insert menu. Choose Heading from the Reference type drop-down list, and Page Number from the Insert Reference To. Select the name of the follow-up heading from the For Which Heading list box and then click Insert.

### **Formatting Text Boxes**

You can change the look of linked text boxes by using color, shading, borders, and other formatting. Select the text box you want to format and then double click its border to open the Format Text Box dialog box. If you want to change the color or borders on a text box, choose the Colors and Lines tab. To change the size, scale, or rotation, click the Size tab. To change the position of the text box on the page, click the Position Tab. If you have other text surrounding the text box, and want to change the way the text wraps around it, click the Wrapping tab. If you want to format all the text boxes in an article, you must format them individually - the formatting on one text box will not apply to the others in the sequence.

### **Using Linked Text for Parallel Articles**

You can use linked text boxes to flow text in parallel "columns" from page to page. This method gives different results than using the Column command on the Format menu, which causes text in column 1 to flow or "snake" to column 2 on the same page. By using linked text boxes, you can instead have text from column 1 flow to column 1 on the next page. The text beside it in column 2 can flow to column 2 on the next page, parallel to column 1. This technique is useful if you need to group two similar articles, for instance, an

article translated in English on the left and the same article translated in French on the right.

To flow text in parallel, display paragraph marks in your document. Click at the top of the page where you want the side-by-side columns to start, and press Enter twice. Click in the first paragraph mark on the page. On the Insert menu, click Text Box and drag on the page where you want the first column. Click Text Box again and then *click* and drag where you want the second column. *Click* in the last paragraph mark on the page, and press Ctrl + Enter to create a page break.

Repeat the process for each page that will contain side-by-side columns in your document and then return to the first text box you created. Click the text box on the left once to select it. Click your right mouse button and then click Create Text Box Link. The pointer becomes a pitcher. Click the text box on the left side of the second page to create a link. Create links for all text boxes within the same article on the left side of the document. Repeat the process for every text box in the right chain or article.

Pressing Enter twice at the top of each page will create an extra empty paragraph. This blank paragraph is useful if you want to insert text or graphics outside of the text boxes. You can delete the extra blank paragraph if you don't need it.

### **Copying linked text boxes**

You can copy an article or a chain of text boxes that are linked together, to another document or to another location in the same document. To copy linked text boxes and the text they contain, you must copy all the linked text boxes in an article. Select the first text box in an article. Hold down Shift, and click each additional text boxes you want to copy. On the Edit menu, click Copy. Click where you want to copy the text boxes and then click Paste.

To copy some of the text from an article, select the text you want to copy from the article and then copy it. Do not select the text box. You can paste text you've copied directly into your document, into another location within the same article, or into another article.

## SIDEBAR ARTICLES

This sidebar article was created with a text box. You can use a sidebar article for any information you want to keep separate from other articles or information that highlights an article next to it. These could include a list of contributors, addresses or contact information, a smaller self-contained story, a preview of the next issue, or a calendar of schedule. The example below shows a Calendar of Events.

## CALENDAR OF EVENTS

### SPECIAL EVENT

PLACE  
TIME

Type a description of your event here.

### SPECIAL EVENT

PLACE  
TIME

Type a description of your event here.

### SPECIAL EVENT

PLACE  
TIME

Type a description of your event here.

### SPECIAL EVENT

PLACE  
TIME

Type a description of your event here.

## MORE WAYS TO CUSTOMIZE THIS TEMPLATE

### FOOTERS

To change the text at the very bottom of each page of your newsletter, click Headers and Footers on the View menu. Use the Header and Footer toolbar to open the footer, and replace the sample text with your own text.

### INSERT SYMBOL

It is a good idea to place a small symbol at the end of each article to let the reader know that the article is finished and will not continue onto another page. Position your cursor at the end of the article, click Symbol on the Insert menu, choose the symbol you want, and then click Insert.

### BORDERS

You can use page borders and text box borders to change the appearance of your newsletter. Borders on text boxes help keep different articles separate, and can set off sidebar articles from the rest of the page. To change a text box border, select it, double click its edge and choose the Colors and Lines tab in the Format Auto Shape dialog box.

*Byline Company* - Use this style to type the author's company.

**SIDEBAR HEAD** - Use this style to type a second-level heading in a sidebar article.

**SIDEBAR SUBHEAD** - Use this style to type a third-level heading in a sidebar article.

**Sidebar Text** - Use this style to type the text in a sidebar article.

**SIDEBAR TITLE** - Use this style to type first-level headings in a sidebar article.

**Footer** - Use this style to type the repeating text at the very bottom of each page.

**Heading 1** - Use this style to create headlines for each article.

**Heading 2** - Use this style to create section headings in an article.

**Jump To and Jump From** - Use these styles to indicate that an article continues on another page.

**Mailing Address** - Use this style in a mailing label to type the destination address.

**POSTAGE** - Use this style in a mailing label to type postage information.

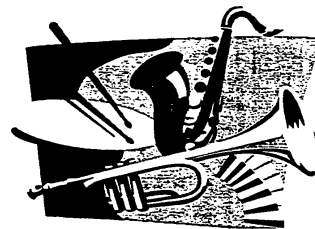
**Return Address** - Use this style in a mailing label to type your address.

**Picture Caption** - Use this style to type a description of a picture or illustration.

**Subtitle** - Use this style to type sub-headings in an article.

---

*Use Pull Quote to excerpt text from the main text of a story to draw a reader's attention to the page. See page 4 for an example.*



## Inserting and Editing Pictures

Type your sub-heading here

You can replace the pictures in this template with your company's art. Select the picture you want to replace, point to Picture in the Insert menu, and click From File. Choose a new picture and then click

Return Address  
Street Number and Name  
City, State 98765-4321

ADDRESS CORRECTION REQUESTED

Insert. Select the Link to File box if you don't want to embed the art in the newsletter. This is a good idea if you need to minimize your file size; embedding a picture adds significantly to the size of the file.

To edit a picture, click on it to activate the Picture toolbar. You can use this toolbar to adjust brightness and contrast,

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***Choose a new picture, and click the Link to File box if you don't want to save the art with the newsletter.***

---

change line properties and crop the image. For more detailed editing, double-click on the graphic to activate the drawing layer.

Bulk RATE  
US POSTAGE  
PAID  
PERMIT No.  
98765

Mailing Address  
Street Number and Name  
City, State 98765-4321

## Printing Job Organizer

Job Name \_\_\_\_\_ Coordinator \_\_\_\_\_ Date \_\_\_\_\_

<i>Function</i>	<i>Person Responsible</i>	<i>Supplier</i>
Write copy		
Edit copy		
Proofread copy		
Approve copy		
Make rough layout		
Approve rough layout		
Make comp and dummy		
Approve comp and dummy		
Choose typesetter		
Specify type and mark up copy		
Set type		
Proofread type		
Create illustrations		
Create charts, graphs, maps		
Create/select photographs		
Approve visual elements		
Miscellaneous camera work		
Choose production artist		
Paste up mechanicals		
Proofread mechanicals		
Approve mechanicals		
Choose/ specify trade services		
Make halftones /separations		
Approve proofs of photographs		

<i>Function</i>	<i>Person Responsible</i>	<i>Supplier</i>
Select paper		
Write printing specifications		
Select possible printers		
Obtain bids from printers		
Choose printer		
Contract with printer		
Approve proofs from printer		
Do printing		
Approve press sheets		
Do bindery work		
Verify job done per specifications		
Verify charges for alterations		
Verify mechanicals and art returned		
Pay printer and trade services		

## GLOSSARY

This glossary contains the technical and business terms used in this book plus many others. Terms come from the fields of publishing, photography, computers, graphic design and printing.

If you need more complete definitions of newsletter terms or want to know the meanings of other terms used in graphic design and printing, consult my book *Graphically Speaking: An Illustrated Guide to the Working Language of Design and Printing*.

**AA** Abbreviation for author alteration.

**alignment** Orientation of type with regard to edges of the column or paper, such as aligned right (flush right), aligned left (flush left), and aligned on center (centered). Also called range.

**alley** Space between images or columns of type on a page, as compared to gutter.

**alteration** Any change made by the customer after copy or artwork has been given to the service bureau or printer. The change could be in copy, specifications or both. Also called AA, author alteration and customer alteration.

**artwork** All original copy, including type, photos and illustrations, intended for printing. Also called art.

**Ascender** Part of lowercase letters, such as h and b, that rises above its x height.

**backup cops** Duplicate of an original made in case of loss or damage of the original.

**banding** Defect in halftone screens or screen tints output by laser printers or image setters in which parallel breaks (stair steps) or streaks appear in the dot pattern.

**banner** Large headline, usually across the full width of a page.

**base art Copy** pasted up on the mounting board of a mechanical, as compared to overlay art. Base art usually has the copy to be printed using black ink.

**baseline** Imaginary line, under a line of type, used to align characters.

**basis weight** In the United States and Canada, the weight, in pounds, of a ream (five hundred sheets) of paper cut to the basic size. Also called ream weight and substance weight (sub weight). When writing basis weight, the word "pound" is abbreviated with the symbol "lb." Fifty-pound coated is written 50# coated.

**bindery** Place where printed products are collated, trimmed, folded and/or bound. A bindery may be a department within a printing company or a separate business.

**bleed** Printing that extends to the edge of a sheet or page after trimming.

**blueline** Prepress photographic proof made from stripped negatives where all colors show as blue images on white paper. Because "blueline" is a generic term for proofs made from a variety of materials having similar appearances, it may also be called a blackprint, blue, blueprint, brownline, brownprint, diazo, dyeline, ozalid, position proof, silverprint, Dylux or VanDyke.

**blurb** Brief description of a person, such as a writer or speaker, appearing as part of an article by that person.

**body copy** 1) Copy set in text type, as compared to display type. 2) The bulk of a story or article, as compared to its headlines and decks.

**bold type** Type that appears darker than the text type of the same typeface.

**bond paper** Category of paper commonly used for writing, printing and photocopying. Also called business paper, communication paper, correspondence paper and writing paper.

**book paper** Category of paper suitable for newsletters and general printing needs. Book paper is divided into uncoated paper (also called offset paper), coated paper (also called art paper, enamel paper, gloss paper and slick paper) and text paper.

**brightness** Characteristic of paper or ink referring to how much light it reflects.

**build a color** To overlap two or more screen tints to create a new color. Such an overlap is called a build, color build, stacked screen build or tint build.

**bulk mail** Alternate term for third-class mail.

**bullet** Bold dot used for typographic emphasis or to identify elements in a list.

**business reply card** Preaddressed card meeting postal regulations for size, caliper, bar coding and prepayment. Also called BRC and reply card.

**byline** The name of the author appearing at the beginning or end of an article.

**callout** Word that identifies part of an illustration.

**camera-ready copy** Mechanicals, photographs and art fully prepared for reproduction according to the technical requirements of the printing process being used. Also called finished art and reproduction copy.

**cap height** Height of capital letters in one type size of a font.

**caption** Identifying or descriptive text accompanying a photograph, illustration, map, chart or other visual element. Also called outline, legend and underline.

**change order** Written instructions about changes to a job already in progress.

**character** Any letter, numeral, punctuation mark or other alphanumeric symbol.

**Cheshire labels** Names and addresses printed on wide computer paper in a format that can be cut into labels and affixed by machines developed by the Cheshire Company. Also called four-up labels.

**clip art** Copy-free drawings available for purchase for unlimited reproduction. Clip art illustrations are printed on glossy paper or stored on computer disks. They are ready for placement on mechanicals or pages designed on computer screens. Also called standard artwork.

**coated paper** Paper with a coating of clay and other substances that improves reflectivity and ink holdout. Mills produce coated paper appropriate for newsletters in three major categories of surface shine: gloss, dull and matte.

**color separation service** Business making color separations for four-color process printing. Also called engraver, prep service, separator and service bureau.

**column rule** Thin vertical line that separates columns.

**commercial printer** Printer producing a wide range of products such as announcements, newsletters and posters. Commercial printers typically use metal plates made from negatives. Also called job printer because each job is different

**composition** 1) In photography, the manner in which an image is arranged and framed to give an overall effect. 2) In typography, the assembly of typographic elements, such as words and paragraphs, into pages ready for printing. 3) In graphic design, the arrangement of type, graphics, and other elements on the page.

**comprehensive dummy** Simulation of a newsletter complete with type, graphics and colors. Also called comp.

**condensed type** Characters relatively narrow in proportion to their height, thus seeming tall and tightly spaced.

**continuous-tone copy** All photographs and those illustrations having a range of shades not made up of dots. as compared to line copy or halftones. Abbreviated contone.

**copy** 1) For an editor or typesetter, all written material. 2) For a graphic designer or printer, everything to be printed: art, photographs and graphics. as well as words.

**copyeditor** Person who checks and corrects a manuscript for spelling, grammar, punctuation inconsistencies, inaccuracies, and conformity to style requirements. Also called line editor.

**copyfit** 1) To calculate the space that a given amount of text requires in a typeface and point size..) To edit writing and adjust typography for the purpose of making text fit a layout.

**copyright** Ownership of creative work by the writer, photographer or artist who made it or, if work for hire, the organization that paid for it.

**copyright notice** Statement of copyright ownership that has the word "copyright" or symbol ©, the year of publication, and the name of the copyright owner. For example, "Copyright 1995 Mark Beach."

**corner marks** Lines on a mechanical, negative, plate or press sheet showing locations of the corners of a page or finished piece.

**credit line** Line of relatively small type next to a photo or illustration giving its source and/or the name of the photographer or artist. May include copyright notice. Also called courtesy line.

**crop** To eliminate portions of an image so the remainder is more useful. pleasing, or able to fit the layout.

**crop marks** Lines near the edges of an image indicating portions to be reproduced. Also called cut marks and tick marks

**cropping Ls** Pieces of paper or cardboard cut into L shapes that, when overlapped, can be adjusted to frame a photograph. Also called cropping angles

**crossover** Type or art that continues from one page across the gutter to the opposite page. Also called bridge. gutter bleed and gutter jump.

**dash** Typographic mark that indicates a break between thoughts. An em dash (-) is longer than an en dash - ) and much longer than a hyphen (-).

**descender** Portion of a lowercase letter falling below its baseline.

**dingbat** Typographic symbol, such as a bullet (•), used for emphasis or decoration

**display type** Type used for headlines, advertising and signs. Also called headline type.

**drop shadow** Screen tint or rule touching an illustration, box or type to give a three-dimensional shadow effect. Also called flat shadow.

**dropped cap** Large capital letter that extends down into the first two or more lines. Used as a design element.

**feature** Article that provides general knowledge, entertainment. or background on the news. Feature articles are usually longer than news articles.

**fillers** Short items. such as proverbs or announcements, kept on hand to fill small blank spaces in a layout.

**film speed** Measure of light sensitivity of photographic film. Fast film is highly sensitive, slow film less sensitive.

**finish** 1) Surface characteristics of paper. 2) General term for trimming, folding, binding, and all other postpress operations.

**finished size** Size of product after production is complete. as compared to flat size. Also called trim size.

**fixed costs** Costs that remain the same regardless of how many copies are printed, as compared to variable costs. The costs of copywriting, photography and design are examples of fixed costs.

**flat 1)** Printer's assembly of film taped to a carrier sheet ready for platemaking. Also called film mechanical and Goldenrod. 2) U.S. Postal Service term for a piece of mail whose length is from 5 to 15 inches and height from 3 1/4 to 12 inches, as compared to letter mail, which has smaller dimensions. Flats include unfolded newsletters.

**fat size** Size of product after printing and trimming, but before folding, as compared to finished size.

**floating rule** Rule, usually between columns, whose ends do not touch other rules.

**fop** To change the orientation of an image so it is the mirror image of its original.

**flush left** Type aligning vertically along the left side of the column. Also called left justified and ranged left.

**flush right** Type aligning vertically along the right side of the column. Also called right justified and ranged right.

**fold marks** Lines on a mechanical, film, printing plate or press sheet indicating where to fold the final product

**font** Complete assortment of upper- and lowercase characters, numerals, punctuation and other symbols of one typeface. A font is a concept, not a physical object. Fonts can be held in the storage or memory of a computer, on sheets of transfer lettering, on film, or in job cases holding metal type.

**footer** Information, such as page number or chapter title, that appears at the bottom of every page. Also called running foot.

**format** Size or layout. depending on context. "The format is 8 1/2" x 11"." "Our newsletter has a one-column format.

**for position only** Refers to inexpensive copies of photos or art used on mechanicals to indicate placement and scaling, but not intended for reproduction. Abbreviated FPO.

**freelancer** Professional, such as writer or photographer, who is self-employed, thus free to accept work from **many** clients. Also called contract artist.

**gang** To halftone more than one image in only one exposure

**gloss finish** Paper with a coating that reflects light well, as compared to dull- or matte-coated paper. Also called art paper, enamel paper and slick paper

**glossy print** Photography term for black and-white print made on glossy paper

**grade** General term used to distinguish between or among printing papers, but whose specific meaning depends on context. Grade can refer to the category, class, rating, finish or brand of paper.

**grain direction** Predominant direction in which fibers in paper become aligned during manufacturing. Also called machine direction.

**grainy** Appearance of a photograph or halftone that has been enlarged so much that the pattern of crystals in the emulsion can be seen in the photo or its reproduction.

**graphic arts** The crafts, industries and professions related to designing and printing on paper and other substrates.

**graphic design** Arrangement of type and visual elements along with specifications for paper, ink colors and printing processes that, when combined, convey a visual message.

**graphic designer** Professional who designs, plans and may coordinate production of a printed piece.

**graphics** Visual elements that supplement type to make printed messages clearer or more interesting.

**gray levels** Number of distinct gray tones that can be reproduced by a computer.

**grid 1)** Pattern of lines representing the layout of a newsletter. A grid may be imaginary, or it may be printed on paper or displayed on a computer screen.

2) Pattern of nonprinting guidelines on a paste-up board or computer screen. Grids help align and organize copy.

**grip and grin** Staged photograph of two people smiling and shaking hands at a ceremonial event.

**gutter** Line or fold at which facing pages meet.

**hairline** Thinnest visible space or rule. Because visibility is determined by factors such as contrast between ink and paper and eyesight of the viewer, hairline has no precise meaning. Hairlines exist in the eye of the beholder.

**hairline register** Subjective term referring to very close register.

**halftone** A photograph or illustration that has been converted into dots for reproduction.

**hard copy** Copy on a substrate, such as film or paper, as compared to soft copy.

**hard mechanical** Mechanical consisting of paper and/or acetate, as compared to electronic mechanical.

**hard proof** Proof on paper or other substrate, as compared to a soft proof.

**header** Information, such as page number or chapter title, that appears at the top of every page of a newsletter.

**hickey** Spot or imperfection in printing, most visible in areas of heavy ink coverage, caused by dirt on the plate or blanket. Also called bull's eye and fish eye.

**highlights** Lightest portions of a photograph or halftone, as compared to midtones and shadows.

**house organ** Newsletter published for employees or members of an organization.

**house sheet** Paper kept in stock by a printer and suitable for a wide variety of printing jobs. Also called floor sheet.

**house style** Guidelines for grammar, typography, color and other graphic features, as adopted by a specific organization.

**image** Type, illustration or other original as it has been reproduced on computer screen, film, printing plate or paper.

**imagesetter** Laser output device using photosensitive paper or film.

**imposition** Arrangement of pages on mechanicals or flats so they will appear in proper sequence after press sheets are folded and bound.

**imprint** To print new copy on a previously printed sheet, such as imprinting an employee's name on business cards. Also called surprint.

**indicia** Postal permit information printed on objects to be mailed and accepted by U.S. Postal Service in place of stamps.

**infographics** Charts, graphs, tables and other visual representations of ideas and statistical information. Also called business graphics and management graphics.

**in-house** Refers to an activity, such as graphic design or printing, performed within an organization, not purchased from outsiders.

**ink holdout** Characteristic of paper that prevents it from absorbing ink, thus allowing ink to dry on the surface of the paper.

**in-plant printer** Department of an agency, business or association that does printing for a parent organization. Also called captive printer and in-house printer.

**ISSN** Abbreviation for International Standard Serial Number.

**issue** 1) All copies of a newsletter having content related to one theme, such as the tenth anniversary issue, or location, such as the western issue. 2) All copies of a newsletter published on the same date, such as the September issue.

**issue date** Year, month or date on which a newsletter was mailed or released.

**italic type** Type slanted to the right to resemble handwriting, as compared to roman type.

**jump** Point at which text moves from one page to another. When the second page does not immediately follow the first, the jump is indicated with "continued on p.\_."

**jumpover** Type that continues from above a photo or illustration to below it, so the reader's eyes must jump over the visual to continue reading the copy.

**justified type** Type set flush right and left.

**kern** To reduce space between two or three characters so those characters appear better fitted together.

**key** To relate loose pieces of copy to their positions on a layout or mechanical using a system of numbers or letters.

**keylines** Lines on a mechanical or negative showing the exact size, shape and location of photographs or other graphic elements. Also called holding lines.

**kicker** Small, secondary headline placed above a primary headline to lead into the primary headline.

**laser printer** Device using a laser beam and xerography to reproduce type, graphics and halftone dots.

**laser type** Type made using a laser printer. Imagesetters also use lasers to make type, but the term "laser type" refers to type produced by toner on plain paper.

**layout** Sketch or plan of how a page or sheet will look when printed.

**lead 1)** Main story in a newsletter. 2) First paragraph in a news story. Pronounced "leed."

**leaders** Dots, dashes or other symbols that guide the eye from one item to another, as in a table of contents. Pronounced "leeder" because the term refers to the verb "to lead."

**leading** Space between lines of type expressed as the distance between baselines. Pronounced "ledding" because the term originated with strips of metal (lead) used to separate lines of hot type. Also called interline spacing and line spacing.

**legible** Referring to type having sufficient contrast with its background so readers can easily perceive the characters, as compared to readable

**letter** U.S. Postal Service term for piece of mail whose height is between 3 1/2 and 6 1/2 inches and length between 5 and 11 1/4 inches, as compared to a flat, which has larger dimensions.

**letter fold** Two folds creating three panels that allow a sheet of letterhead to fit a business envelope. Also called barrel fold and wraparound fold.

**letter spacing** Amount of space between all characters. Also called character spacing.

**line copy** Any high-contrast image, including type, as compared to continuous-tone copy. Also called line art and line work.

**lines per inch** Linear measure of screen ruling expressing how many lines of dots there are per inch in a screen tint, halftone or separation. Abbreviated lpi.

**logo** Abbreviation for logotype. an artistic assembly of type and art into a distinctive symbol unique to an organization, business or product. Also called emblem.

**mailing service** Business specializing in addressing and mailing large quantities of printed pieces. Also called lettershop.

**makeover 1** ) New design replacing an old design. 2) Printing job done over again-made over without changes-because of unacceptable flaws in the previous production run.

**mark up** To write on a manuscript or proof instructions about matters such as typesetting, color correcting or printing.

**markup** Amount of money that one supplier adds to the price of goods or services secured for a customer from another supplier.

**mask** To prevent light from reaching part of an image, therefore isolating the remaining part. Also called knock out.

**masking material** Opaque paper or plastic used to prevent light from reaching selected areas of film or a printing plate. Also called knockout film. Masking material is often referred to by brand names, such as Amberlith, Goldenrod and Rubylith.

**masthead** Block of information in a newsletter that identifies its publisher and editor and tells about advertising and subscribing.

**matte finish** Flat (not glossy) finish on photographic paper or coated printing paper.

**measure** Width of a column of type. With justified type, all lines have the same measure. With ragged type, measure equals the longest possible line. Also called line measure.

**mechanical** Camera-ready assembly of type, graphics and other copy complete with instructions to the printer.

**merge/purge** To combine two or more databases (merge), then eliminate duplicate records (purge). Usually refers to a function performed by a list house on address lists before mailing.

**midtone** In a photograph or illustration, tones created by dots between 30 percent and 70 percent of coverage, as compared to highlights and shadows.

**modem** Acronym for modulator/demodulator, a device that converts digital signals to analog tones and vice versa so computers can communicate over telephone lines.

**moire** Undesirable pattern resulting when halftones and screen tints are made with improperly aligned screens or when a pattern in a photo, such as a plaid, interferes with a halftone dot pattern.

**mottle** Spotty, uneven ink absorption. Also called sinkage. A mottled image may be called mealy.

**mounting board** Any thick, smooth piece of paper used to paste up copy or mount photographs.

**mug shot** Photograph showing only a person's face.

**multicolor printing** Printing in more than one ink color (but not four-color process). Also called polychrome printing.

**nameplate** Portion of front page of newsletter that graphically presents its name, subtitle and date line

**newsletter** Short, usually informal periodical presenting specialized information to a limited audience.

**offset printing** Printing technique that transfers ink from a plate to a blanket to paper instead of directly from a plate to paper.

**Opacity** Characteristic of paper that prevents printing on one side from showing through to the other.

**original art** Initial photo or illustration prepared for reproduction.

**out of register** Characteristic of an image not printed in register. Also called misregister.

**overlay** Layer of material taped to a mechanical, photo or proof. An overlay has the same dimensions as the mounting board that it covers. There are two types of overlays:

**Acetate overlays** are used to separate colors by having some type or art on them instead of on the mounting board.

**Tissue overlays** are used to carry instructions about the underlying copy and to protect the base art.

**overprint** To print one image over a previously printed image, such as printing type over a screen tint. Also called surprint.

**overrun** Number of pieces printed or paper made in excess of the quantity ordered.

**overs** Printed pieces in an overrun.

**page** One side of a leaf in a newsletter. One sheet folded in half yields four pages. An eight-page signature has four pages printed on each side of the sheet

**page count** Total number of pages that a newsletter has. Also called extent.

**page proof** Proof of type and graphics as they will look on the finished page complete with elements such as headings and rules.

**press check** Event at which makeready sheets from the press are examined before authorizing full production to begin.

**PANTONE Colors** Brand name of colors in the *PANTONE* Matching System.

**paper distributor** Merchant selling paper wholesale to printers and other buyers of large quantities.

**paste up** To paste copy to mounting boards and, if necessary, to overlays so it is assembled into a camera-ready mechanical. The mechanical produced is often called a pasteup.

**pasteup board** Any piece of paper or board used as the base for a mechanical. Also called lineup boards.

**phototype** Type created by projecting light onto photosensitive paper.

**pica** Anglo-American unit of typographic measure equal to .166 inch (4.218mm). One pica has twelve points.

**PMS** Obsolete reference to *PANTONE* Matching System. The correct trade name of the colors in the *PANTONE* Matching System is *PANTONE* Colors, not PMS Colors.

**point** Regarding type, a unit of measure used to express size (height) of type, distance between lines (leading) and thickness of rules. One point equals  $\frac{1}{12}$  pica and .01387 inch (.351mm).

**position stat** Photocopy or PMT of a photo or illustration made to size and affixed to a mechanical. Position stats show proper cropping, scaling and positioning.

**PostScript** Brand name for a page description language used in laser printers and imagesetters.

**prepress** Camera work, color separating, stripping, platemaking and other prepress functions performed by the printer, separator or a service bureau prior to printing. Also called preparation.

**preprint** To print portions of sheets that will be used for later imprinting.

**presort** To separate mail into categories, such as postal codes, before mailing it.

**printer spreads** Mechanicals made so that they are imposed for printing, as compared to reader spreads. For example, an 11" x 17" mechanical for an eight-page newsletter would have pages 2 and 7 opposite each other. See also imposition.

**proof** Test sheet made to reveal errors or flaws, predict results on press, and record how a printing job is intended to appear when finished.

**proofread** To examine a manuscript or proof for errors in writing or typesetting.

**proofreader marks** Standard symbols and abbreviations used to mark up manuscripts and proofs. Most dictionaries and style manuals include charts of proofreader marks. Also called correction marks.

**proof sheet** 1) Photographic term for sheet of images made by contact printing negatives. Also called contact sheet. 2) Printing term for any proof or press sheet used as a proof.

**proportion scale** Round device used to calculate percent that an original image must be reduced or enlarged to yield a specific reproduction size. Also called percentage wheel, proportion dial, proportion wheel and scaling wheel.

**publisher** 1) Person or organization that coordinates creation, design, production and distribution of newsletters. 2) Chief executive officer or owner of a publishing company.

**pull quote** Words from an article printed in large type and inserted in the page similarly to an illustration.

**quality** Subjective term relating to expectations by the customer, printer, and other professionals associated with a printing job and whether the job meets those expectations.

**quick printing** Printing using small sheetfed presses, called duplicators, using cut sizes of bond and offset paper. Paper, plastic or rubber plates are made directly from camera ready copy, as compared to metal plates for commercial printing that require making film first.

**quotation** Price offered by a printer to produce a specific job. thus alternate for estimate. The quoted price is the printer's side, of the contract based on specifications from the customer.

**ragged-left/right type** Type whose line beginnings/endings are not aligned vertically.

**readable** Characteristic of printed messages that are easy to read and understand, as compared to legible.

**reader spread** Mechanicals made in two page spreads as readers would see the pages, as compared to printer spread. For example, an 11" x 17" mechanical for an eight-page newsletter could have pages 2 and 3 opposite each other.

**register** To place printing properly with regard to the edges of paper and other printing on the same sheet. Such printing is said to be in register.

**register marks** Cross-hair lines on mechanicals and film that help keep flats, plates and printing in register. Also called crossmarks and position marks.

**rescreen** To create a halftone of an image that is already printed as a halftone; for example, rescreening a photo appearing in a magazine for reprinting in a newsletter. When not done properly, rescreening yields a moire.

**resolution** Sharpness of an image on film, paper, computer screen, disk, tape or other medium.\

**reverse** Type, graphic or illustration reproduced by printing ink around its outline, thus allowing the underlying color or paper to show through and form the image. Also called knockout and liftout. The image "reverses out" of the ink color.

**rights** Conditions and terms of a licensing agreement between a copyright owner and a publisher.

**roman type** Type with serifs and that is upright, as compared to italic. Also called plain type. Roman is the basic typeface in any type family. Other typefaces in the family are based on the roman. For example, light is lighter than roman and bold is darker.

**rough layout** Sketch giving a general idea of size and placement of text and graphics in the final product. Also called esquisse and rough.

**rule** Line used as a graphic element to separate or organize copy. The width of rules is measured in points or millimeters.

**runaround** Type set to conform to part or all of the shape of a neighboring photograph or illustration. Also called wraparound.

**saddle stitch** To bind by stapling sheets together where they fold at the spine, as compared to side stitch. Also called pamphlet stitch, saddle wire and stitch bind.

**sans-serif type** Type without serifs. Also called gothic type.

**satın finish** Alternate term for dull finish on coated paper.

**scale** To identify the percent by which photographs or art should be enlarged or reduced to achieve the correct size for printing. An 8" x 10" photo to be reproduced as a 4" x 5" image should be scaled to 50 percent.

**scalloped columns** Page layout in which columns of unequal length are aligned at the top so their bottoms vary. Also called hanging columns.

**scan** To read an image using a pinpoint beam of light.

**scanner** Electronic device used to scan an image.

**screen** To convert a continuous-tone image into a halftone or a solid into a screen tint.

**screen density** Refers to the amount of ink that a screen tint allows to print. Also called screen percentage. Screen density is expressed as percent of ink coverage.

**screen ruling** Number of rows or lines of dots per inch or centimeter in a screen for making a screen tint or halftone. Also called line count, ruling, screen frequency, screen.

**variable costs** Costs of a printing job that change depending on how many pieces are produced, as compared to fixed costs. Costs for paper, printing and binding are examples of variable costs.

**vellum finish** Somewhat rough, toothy finish; smoother than antique, rougher than English.

**Velox** Brand name for high-contrast photographic paper.

**washed out** Characteristic of printing or a photograph whose images appear faded.

**waste** Unusable paper or paper damaged during normal makeready, printing or bindery operations, as compared to spoilage.

**white space** Area of a printed piece that does not contain images or type. Also called negative space

**wide angle lens** Camera lens whose field of view is wider than the eye can normally see, as compared to telephoto lens. Also called short lens.

**window** On a mechanical. in area that has been marked for placement of a halftone. When photographed using graphic arts film, a window made using masking material (dark area) creates a window on the film (transparent area).

**x height** Vertical height of a lowercase x in a typeface. X height: varies from one typeface to another. Also called body height.

**ZIP code** Acronym for Zone Improvement Plan code, five numerals that identify every Post Office and substation in the United States.

**ZIP+4** Five-digit: ZIP code plus four additional numerals giving more precise information about the address.