



Periodicals

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Periodicals Discussion Subjects

- Requalification Exception
- Advertising
- Proposal for Subscription Related Material
- Periodicals Preferred Prices





Periodicals Requalification Exception

- Due to COVID-19 there was an temporary exception given to Periodicals publishers due to the difficulties publishers are having renewing requester and subscriber/paid publications
- This exception allows for publishers to continue to count their expired requesters/subscribers as legitimate requesters/subscribers under certain conditions
- This exception includes Membership publications





Periodicals Requalification Exception – Cont'd

Conditions

- Publishers must continue to serve these requesters and/or subscribers
- This exception allows for all requesters/subscribers that expired between January 15, 2020 thru July 1, 2021
- This is a temporary exception will be reevaluated before July
- At this time it will probably not be extended





Advertising

- Material for which a valuable (useful, desirable) consideration is paid, accepted, or promised. Calling the reader's attention to buy something, sell something, seek out a service, or to support a program, event, or service
- A newspaper's or publication's advertisement of its own products, services, or issues, or any other business of the publisher, whether in display advertisements or reading matter.





Non-Advertising or Editorial

- Editorial including non-text (Photos, charts, maps, etc.)
- Public Service Announcements
- Eligible subscription related material (Weight Only)
- Address correction information (Weight Only)
- Ineligible Periodicals enclosures or attachments (Mixed Price content such as Marketing Mail, First-Class or Ride-Along material) are excluded from advertising and content

Periodicals





"Weight Only"

- Excluded from advertising/non-advertising calculation
- The weight of the material is included in the postage calculation total as per the weight of the copy

Examples

- Eligible subscription related material & address correction information
- Blank page where the reverse side is editorial material
- Mailing wrapper for publication (space without advertising)

Periodicals





"Advertorial"

 Articles, items and notices in the form of reading matter inserted by custom or understanding that textual matter is to be inserted for the advertiser or the advertiser's products in the publication in which a display advertisement appears





"Advertorial"

- Reading material paid for or by advertisers must be identified as advertising
- Identify as "Advertising" or "Advertising Section".
- Federal Statute as well as a postal mailing standard
- Violations can be subject to fines
- Always verify with your legal department





Ineligible Periodicals Enclosures

- Contains a separate ISSN or USPS # (Not publication's number)
- Insert with a Permit Imprint indicia
- Component identified as a "catalog" (refers to)
- A separate price or subscription instructions different from those of the host publication
- Blank sheet
- Product





Calculating Advertising

- Must mark a copy for advertising of each edition of every issue
- Must show on front/cover page the units of adv & non adv & percentages & method
- Three methods (total pages, square inches or column inches)
- Must apply one method throughout copy including Periodicals components
- Must submit to Original or Mailing Post Office (Exception: if in Alternate Marked Copy program)





How Much Advertising is Allowed

- General (Paid) Can't exceed 75% advertising in more than half the issues in a twelve month period
- Requester Can't exceed 75% in more than a quarter of the issues in a
 12 month period
- Cannot exceed 75% in separately addressed supplement
- Other supplements have no advertising limit





How Much Advertising is Allowed

- Nonprofit 10% advertising or less counts as 0% advertising
 NOTE: If over 10% is calculated at actual amount of advertising
- Institutions & Societies with Publisher's Own Advertising Only –
 Cannot carry outside advertising; only publisher's own advertising





Periodicals Subscription Related Material Proposal

- Currently mailing standards allow for subscription related material to be considered "weight only" if the material and subscription is loose in publication (included in wrapper)
- If the subscription related material is bound-in/attached (excluding card/offer or envelope) to the host publication that material is considered advertising
- The proposal is to allow the bound-in/attached subscription related materials to be calculated as "weight only" (same as loose material)





- In-County
- Nonprofit
- Science of Agricultural
- Classroom
- Limited Circulation
- Science of Agricultural Limited Circulation





- <u>In-County</u> All copies mailed to recipients of the county of the publisher for publications:
 - With 10,000 copies or less of total distribution or;
 - If total distribution is over 10,000, then half of the copies distributed must be In-County
- <u>Limited Circulation (Also for Science of Agricultural)</u> If eligible In-County copies are mailed at In-County prices, the Outside County copies for same issue are eligible for discount if less than 5,000 OC copies for the issue (5% discount)





- Nonprofit Publications that qualify for Periodicals Nonprofit prices
 - Not all Nonprofit organizations that qualify for Marketing Mail Nonprofit qualify for Periodicals Nonprofit (5% Discount)
- <u>Classroom</u> Applies to educational, religious, or scientific publications that are only designed for use in school classrooms or religious instruction classes (5% Discount)





- Science of Agricultural Applies to Outside County copies of authorized Periodicals publications mailed by publishers or news agents to subscribers or requesters residing in rural areas
- The total copies distributed during any 12-month period must be at least 70% of the total number of copies distributed by any means for any purpose (Reduced Pound Prices)





- Can only use 5% discount for one preferred price 5% discount category (e.g. if a Nonprofit and also a Classroom publication only one 5% discount can apply)
- 5% discount applies to Non-Advertising Pound, Piece, Bundle and Container Prices
- 5% discount does not apply to Advertising prices





Periodicals Questions







Periodical Mail Updates & Housekeeping

Steve W. Smith

Base 60 Consulting

National PCC Advisory Education Sub-Committee





Periodical Identity Who You Serve

Periodicals serve a role in the education and entertainment of society. Each issue represents the richness of opportunity to inform and assist subscribers, members, students, educators, and the general public.





Periodicals Your Questions

Improving Distribution Speed

Label Lists – What Are They and Where?

Placards – It Went That Way.

Palletization / Co-Mail – Which For My Title(s)?

Exceptional Dispatch – Newspapers, But Others?

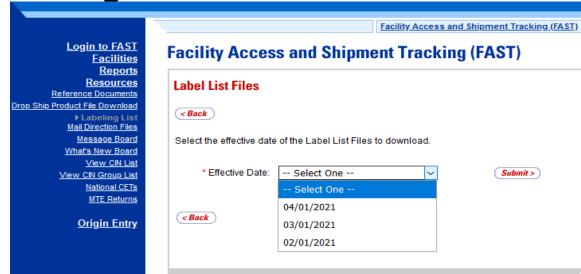




Periodical Updates
Monthly Labeling List Changes

Review The Distribution Scheme In The Label List Files To Understand How Your Periodicals Flow.

L006 5-Digit FSS Scheme - Periodicals, ...Flats in Bundles







Periodical Updates Monthly Labeling List Changes

Effective Date: 2021-03-01 Grace Date: 2021-04-30

L006 5-Digit FSS Scheme - Periodicals, Standard Mail, and Package Services Flats in Bundles
L006 describes the FSS Labeling List with 'Column A' being the Destination Zips, 'Column B' as the Scheme Bundle/Pallet Label, and 'Column C' as the
Residual Pallet Label'.

Column A Destination ZIP Codes	Column B Scheme Bundle/Container Placard	Column C Facility Container Placard
01001, 01030, 01089	FSS AGAWAM MA 01001	FSS NDC SPRINGFIELD MA 011
01007, 01077, 01085	FSS BELCHERTOWN MA 01007	FSS NDC SPRINGFIELD MA 011
01013, 01020, 01022	FSS CHICOPEE MA 01013	FSS NDC SPRINGFIELD MA 011
01027, 01060, 01062	FSS EASTHAMPTON MA 01027	FSS NDC SPRINGFIELD MA 011

Periodicals - Updates & Housekeeping



Grace Date: 2021-04-30



Periodical Updates Monthly Labeling List Changes

Effective Date: 2021-03-01 Note Effective Date

L006 5-Digit FSS Scheme - Periodicals, Standard Mail, and Package Services Flats in Bundles

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Periodicals - Updates & Housekeeping





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Placard Check

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Periodical Palletizing – Do You Qualify?

Minimum

Software capable of preparing pallet prepared mail.

Pallets – USPS provided –or- secure, compatible industry provided.

Supplies & Equipment – Wrap, trays, boxes, corner boards, etc

250 pounds to destinations (500 lbs requires palletization).

Destination placards produced by the software.

Pallet Charge vs. Sack Charge – Bundles on pallets may save.

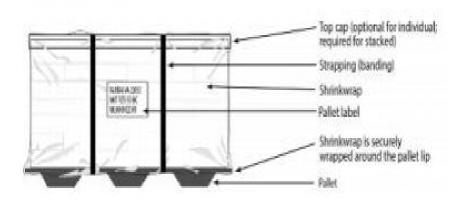
Periodicals – Updates & Housekeeping https://pe.usps.com/text/qsg300/q705a.htm



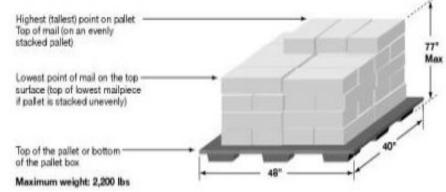


Periodical Palletizing – Looks Like What?

Pallet Components



Pallet Measurements



Periodicals – Updates & Housekeeping https://pe.usps.com/text/qsg300/q705a.htm





Periodical

Co-Palletizing – Save Distribution Time?

Co-palletizing a periodical means the mailer used software to arrange presorted bundles of differing periodical titles on a pallet.

The co-pallets are then Drop Shipped to destination providing some postage discount to offset the additional cost of transportation. Importantly, an improvement in delivery time may be the key to considering co-palletization as an option.





Periodical

Co-Mailing – How Is This Different?

Co-mailed periodical – One title's address files is combined with address files of other publications and presorted together into one qualified mail-stream.

Minimum number of copies per bundle.

Greater copy numbers qualify for better presort levels.

Remember Label List? – There are four presort levels.

Periodicals - Updates & Housekeeping





Periodical Efficiency In Copies

Target increased circulation in the sortation that are less than the 5 digit / 3 digit sortation.

Provide marketing with Zip Codes that could use (x) copies to increase the bundle count to move a bundle up to the next better sort.

MXD ADC 3Digit SCF 5Digit Carrier Route





Periodical

Exceptional Dispatch ~ Purpose

The postmaster of an entry post office may authorize a publisher to deliver copies of a time-sensitive Periodicals publication, at the publisher's own expense and risk, by exceptional dispatch from the post office of original or additional entry to other post offices.





Periodical

Exceptional Dispatch ~ Intended Use

The provision for exceptional dispatch is intended for short-haul local distribution (zones 1 and 2) of publications with total circulation of no more than 25,000 and is not to be used to circumvent additional entry standards.

Applications for exceptional dispatch for publications with over 25,000 total circulation may be considered on a case-by-case basis for possible waiver of the 25,000-circulation limit.





Periodical Format

Periodicals must be issued regularly on a stated frequency. Minimum four times per year.

The continuity of the periodical must show from issue to issue.





Periodical Format

The content of the periodical may consist of original or reprinted articles on one topic or many topics, listings, photographs, illustrations, graphs, a combination of advertising and non-advertising matter, comic strips, legal notices, editorial material, cartoons, or other subject matter.





Periodical Format

A Mail piece must have less than 75% advertising.

Mailers must have an established list of subscribers or requesters





Periodical Statement of Ownership PS 3526(*versions*)

All publishers who are authorized to mail at Periodicals rates must file a PS Form 3526, *Statement of Ownership, Management, and Circulation,* on or before October 01 of each year, at their original entry Post Office.





Periodical Statement of Ownership ~ Publishing Requirements

Publishers of general and requester publications to publish their Statement of Ownership, Management, and Circulation according to the standards in the Mailing Standards of the United States Postal Service, Domestic Mail Manual (DMM).





PeriodicalStatement of Ownership

Format and print only the information needed to provide an accurate, complete filing. STATEMENT OF OWNERSHIP, MANAGEMENT, AND MONTHLY CIRCULATION OF

NATIONAL GEOGRAPHIC

WNER AND PUBLISHER: National Geographic Partners, LLC

GARY E. KNELL, CHAIRMAN

SUSAN GOLDBERG, EDITOR IN CHIEF

HEADQUARTERS OF PUBLISHER AND PUBLICATION: 1145 Seventeenth Street N.W., Washington, DC 20036

STOCKHOLDERS; BONDHOLDERS; MORTGAGE; OTHER SECURITY HOLDERS: National Geographic Society and The Walt Disney Company

	AVERAGE NO. COPIES EACH ISSUE DURING PRECEDING 12 MOS.	SINGLE ISSUE NEAREST TO FILING DATE
A. TOTAL COPIES PRINTED	OCT 2018 - SEPT 2019	SEPTEMBER 2019
(Net Press Run)	2,888,629	2,769,619
B. PAID CIRCULATION		
1. Outside-County Mail Subscriptions	2,034,259	2,125,630
2. In-County Mail Subscriptions		
3. Single Copy Sales/Non USPS Paid Distribution	581,343	542,368
4. Other Classes Mailed Through USPS		
C. TOTAL PAID CIRCULATION	2,615,602	2,667,998
D. FREE DISTRIBUTION (includes samples, no news agents)		
1. Outside-County	53,513	89,437
2. In-County		
3. Other Classes Mailed Through USPS		
4. Free Distribution Outside the Mail	9,003	9,815
E. TOTAL FREE DISTRIBUTION	62,516	99,252
F. TOTAL DISTRIBUTION (Sum of C and E)	2,678,118	2,767,250
G. OFFICE USE, LEFTOVER, ETC.	210,511	2,369
H. TOTAL (Sum of F & G)	2,888,629	2,769,619
I. PERCENT PAID	98%	96%





PeriodicalStatement of Ownership

Some publishers print the facsimile form sometimes taking a whole page.

POSTAL SERVICE :	Statement of	Owners			ent, and Circulation Publications Only
1. Publication Title		2. Publication		-queste.	3. Filing Date
1. Publication Title		1. Pusicanos	-		2. Fing Date
4. Issue Frequency		S. Number of	Issues Publ	shed Annually	Annual Subscription Price (If any)
7. Complete Mailing Address of Known Office of	Publication (Vorgeletar) (Stre	et, city, county	arare, and 2	[[P+68]	Contact Person
					Telephone (Include area code)
Complete Mailing Address of Headquarters or	r General Susiness Office of P	Publisher (Nor p	rimerj		
9. Full Names and Complete Valling Addresses	of Publisher, Editor, and Man	aging Editor (C	o nor leave i	blank)	
Publisher (Name and complete malling address)					
Editor (Name and complete mailing address)					
Managing Editor (Name and complete multing a	ddrecs)				
 Owner (Do nor leave blank. If the publication names and addresses of all stockholders on names and addresses of the individual owner each individual owner. If the publication is pre- 	ining or holding 1 percent or it ers. If owned by a permership	nore of the total or other unlines	amount of a sporated fire	nock. If nor own , give its name	red by a corporation, give the
Full Name		Complete Ma			
 Known Bondholders, Mortgagess, and Othe Other Securities. If none, check box. 	r Security Holders Owning or		ent or More o	of Total Amoun	of Bonds, Mongages, or
Full Name		Complete Ma	illing Addre	**	

^{12.} Tax Status (For completion by nonprofit organizations authorized to mail at nonprofit rates) (Check one). The purpose, function, and nonprofit status of his organization and the exempt status for federal income tax purposes. If Has No Changed During Preseding 12 Months.





Take A Breath Spring Is Coming

Questions?







Additional Resources

Domestic Mail Manual - https://pe.usps.com/DMM300/Index

Periodicals Section 207 - https://pe.usps.com/text/dmm300/207.htm

Mr. Magazine™ - https://www.mrmagazine.com/about.html

Red Tag News Publications - http://redtag.org/redtag/init.asp

Periodicals - Updates & Housekeeping





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