



NORTH CAROLINA SCHOOL OF SCIENCE AND MATHEMATICS

Title	REGULATIONS ON PUBLICATIONS AND MAILING LISTS
Authority	Chancellor
History	Revised December, 2006
Legal Reference	BOG 1300.2[R] Regulations on Publications and Mailing Lists
Additional References	G.S. 143-168 to 143-170.4; G.S. 125-11.5
Responsible Offices	Chancellor, Vice Chancellor Finance and Operations, Vice Chancellor for Institutional Advancement
Classification	6900

PURPOSE OF THE NCSSM PUBLICATIONS GUIDE

This reference guide was created to help department heads and program managers work with the Communications Office to produce quality publications that meet NCSSM standards, as well as to satisfy the requirements set out by state government. The table of contents is intended to provide NCSSM staff with a quick reference about their role in the process, from identification of the publications need, through production of copy and design for the publication, to purchasing printing.

The mission statement adopted in 1990 by the NCSSM community and Board of Trustees charges this institution with helping to meet North Carolina's need for responsible leadership in the development and application of science, mathematics and technology. Other components of that mission include serving as a catalyst for educational improvement in this state and in the nation; educating 11th and 12th grade students who demonstrate academic talent and promise in science and mathematics; developing and sharing instructional information designed to improve teaching and learning in North Carolina and the nation.

The NCSSM Communications Office directly contributes to carrying out the school's mission by speaking with one voice to project a well-managed, results-oriented institution with a clearly defined purpose as a national model for specialized secondary education. To achieve that goal, our school must effectively communicate the character and excellence of this institution via consistent standards for publications design and editorial style, as well as through adopted practices for use of the NCSSM name and logo.

The State of North Carolina requires our adoption of the standards presented in this guide. This enables NCSSM to approach our communications program in an organized manner with attention to the image that we wish to project.

NCSSM AND STATE PUBLICATIONS GUIDELINES

Public Documents

The N.C. Department of Administration has established guidelines for producing, distributing and evaluating public documents at all state institutions. State law defines a "public document" as any annual, biennial, regular or special report or publication of which at least 200 copies are printed. This does not include communications within an agency or agency correspondence. The N.C. Attorney General's Office has issued an opinion declaring that these guidelines are applicable only to publications produced with state-appropriated funds. No special exclusions are made to this definition, which encompasses newsletters, brochures, course catalogs, marketing materials, annual reports and other regular or special publications that meet the criteria outlined in G.S. 143-169.2(a).

Primary NCSSM publications included in this definition are:

- Course catalog
- *NCSSM* magazine
- Admissions application booklet
- Student recruiting brochure and poster
- Summer Ventures publications
- Public service and other program brochures

These examples and classifications of NCSSM publications covered by the state's definition of public documents are not intended as an all-inclusive list. The family of NCSSM publications will change from year to year. Departments should consult the Communications Office to determine which publications are subject to state review. The University of North Carolina General Administration, however, highly recommends these standards for internal documents, as well as other publications subject to state review. In all cases, NCSSM publications should reflect the quality standards outlined in this guide.

Review and Approval Process

The Communications Office serves as a consultant and clearinghouse for publications planning within the mission, goals and priorities established by the Chancellor and Board of Trustees. The office consults with departments or recommends contracted services, assures that NCSSM adheres to state requirements within the publication process and establishes quality publications standards to reflect a consistent image of the school. As a clearinghouse, the office seeks to communicate the purpose of the school to various audiences, including students, parents, alumni, donors, the community, the University of North Carolina, legislators, corporations, foundations and other friends of NCSSM.

Departments on campus creating publications should contact the Communications Office to review how new publications fit within the family of NCSSM publications, to review the purpose/target audience(s) of the publication, to make sure that all state regulations are met, and to discuss design concepts and use of the logo.

State Regulations

The State of North Carolina expects NCSSM to follow all statutory requirements related to production of public documents. The following policies apply to NCSSM publications:

- ◆ Statement of Cost

G.S. 143-170.1 requires that all printed documents in quantities of 200 or more, other than those principally for sale, carry the following statement, which should include all related production costs in the form of labor and materials, printing and other identifiable design, typesetting and binding costs: "# copies of this public document were printed at a cost of \$000, or \$000 per copy."

A 1989 amendment of the law prohibits the mailing and distribution, at public expense, of any public document lacking the statement of cost. Failure to put the cost statement on a publication will result in a penalty of 10% of the school's publication budget.

When a public document is printed on recycled paper, the document must contain a statement or symbol indicating that it was printed on recycled paper. [N.C.G.S. § 143-170.1 (a2)]

◆ Use of Four-Color Reproduction Process

G.S. 143-169 limits the use of multicolor, four-color, process printing for publications published at state expense. This has changed in recent years as the cost of color printing has declined and the admissions materials and NCSSM Magazine have been approved for four-color printing.

◆ Review of Mailing Lists

G.S. 143-169.1 requires that all NCSSM mailing lists be annually revised, corrected and updated. The Chancellor is required to certify to the state budget director no later than July 1 each fiscal year that this activity has been completed and that NCSSM is in compliance as of June 30. The Communications Office verifies the accuracy of the mailing lists prior to preparing this report for the executive director's signature.

NCSSM departments must annually review and correct mailing lists. For example, the NCSSM magazine return address includes the statement, "Address Correction Requested," to enable the school to regularly correct and/or purge that mailing list. The same procedure is used for media, school and other mailing lists used by the Communications Office.

To update and correct the mailing list, the statute requires that the agency include on the list only those persons or organizations who, within the previous 12 months, have either requested that they be included on the mailing list or have renewed a request that they be included, or are on the mailing list by express provision of statute or judicial order.

◆ Distribution of Publications

State governmental agencies are required by law to deposit copies of specified publications with the State Publications Clearinghouse of the Division of State Library, N.C. Department of Cultural Resources, in compliance with G.S. 125-11.5.

Ten copies of the following categories of NCSSM publications must be supplied to the NCSSM Director of Communication's Office for mailing to the clearinghouse coordinator in Raleigh within 10 days of issuance of the document:

- Course catalogs
- Magazines and other periodicals (including student literary magazines)
- Departmental and program brochures
- Annual reports

- Recruiting publications
- Newsletters
- Other bibliographies, compilations, statistical reports or registers
- Exclusions include intra-agency memos, news releases, calendars, event programs, student yearbooks and newspapers, internal handbooks, job announcements or class schedules.

§ 125-11.10. Duties of State agencies.

(a) State agencies shall send the requested number of copies of each of their publications to the Clearinghouse within 10 days of issuance.

(b) The head of each State agency shall designate a publications officer who shall be responsible for supplying the requested number of copies of each State publication of that agency to the Clearinghouse. Each agency shall notify the Clearinghouse of the identity of its publications officer before October 1, 1987, and within 30 days of any change of publications officer. The publications officer shall supply the Clearinghouse semiannually a complete list of the agency's State publications issued within the previous six months and any other information regarding the publications of the agency requested by the Clearinghouse.

(c) State agencies may request permission from the State Library to submit fewer than the requested number of copies of a document. The request shall include information on the cost of the document and the projected public interest in the document. (1987, c. 771, s. 2.)

◆ Sale of Documents

No statute similar to G.S. 143-170.1 exists governing pricing of documents for resale, either at cost or for-profit. To comply with G.S. 143-170.2, state agencies' publications manuals must address pricing of documents for resale.

The Communications Office presently offers all printed documents free of charge. The Chancellor must approve the sale of an NCSSM publication intended for a public audience.

Copyright

NCSSM encourages reproduction of most promotional information and other publications about the school; therefore, the majority of documents do not require a copyright notice.

Compliance.

1. Each chancellor is considered the “chief administrator authorizing the printing” is, therefore, responsible for compliance with the act.
2. Each chancellor shall be the certifying officer for all mailing lists generated at the institution.
3. In rendering the certification to the director of the budget, the certifying officer should use the following wording:

I certify that all mailing lists of [name of institution] subject the provisions of N.C.G.S. § 143-169.1, have been carefully reviewed, updated, and corrected within the 12-month period ending June 30, 20__, and were, therefore, in compliance with the requirements of the act as of June 30, 20__.

4. This certification should be sent directly to the director of the budget by July 1 of each year.

5. Each chancellor should provide for the cost accounting of public documents as set forth in previous section(s).
6. When an agency fails to insert in a public document the cost statement and/or the notice or symbol concerning use of recycled paper when required, “the agency’s printing budget for the fiscal year following the violation shall be reduced by ten percent (10%).” [N.C.G.S. § 143-170.1

The correct number of agency publications should be submitted with a completed Publications Transmittal Form and other appropriate forms.

PURCHASING DESIGN, PRODUCTION AND PRINTING SERVICES

Working with the Communications Office

The NCSSM Communications Office works directly with departments to plan, schedule, and produce publications. This office as well as freelance writers, designers, and production professionals who contract with NCSSM, will assist the project coordinator in producing quality publications that reflect the school's mission, goals and priorities established by the executive director and Board of Trustees.

This section provides specifics about purchasing technical services to create professional publications that effectively communicate a consistent image of the school. As outlined in the review and approval process in an earlier section, project coordinators should follow these steps for production of publications:

Graphic Services Request for new publications: Approximately 45 established publications are part of a yearly production cycle for NCSSM departments. Lead-time is built in for all production phases, including approval of state purchase requests. When a project coordinator identifies the need for a new publication, a Graphic Services Request form should be submitted to the Communications Office. Outlining the purpose for the project may show that an alternate approach (i.e., a letter or audio-visual communication) is the preferred medium.

The Graphic Services Request includes basic questions about quantity, budget, content, audience, distribution method and deadlines. Major projects such as an annual report require a **minimum of six months** for planning and production, prior to printing. Smaller projects, such as brochures, fact sheets or programs, require a **minimum of four weeks** to work into the schedule, secure purchasing approval and complete production.

Discussion of purpose/target audience(s) of publication: After completion of the Graphic Services Request form, the project coordinator generally will know if production of a publication is desirable within the priorities established by the school and the department, with existing budget and in the time available. The project coordinator should meet with the Communications Office to discuss the purpose of the publication and target audience.

Agreement on relationship to NCSSM family of publications: At the same time, the Communications Office must determine if, and when, the new publication fits into the family of

NCSSM publications, as well as within the publications production schedule for the year. Communications begins each fiscal year with a fixed budget and an annual plan for publications. The office is in a better position to consider new publications for the following year during the planning period between January and June, prior to the end of the current cycle.

Identification of budgeted funds for production: When the proposal is outlined, the project coordinator should identify the source of funds for production of the publication. The Communications Office works within an established budget for existing publications, or with funds from other departmental or special program budgets. Available funds must be verified before planning begins.

Establishing a written production schedule: At the first meeting with the Communications Office, the project coordinator should provide a tentative deadline for the finished project to determine if enough time is available to produce the desired publication. The office can advise whether the project can be worked into the schedule. The project coordinator should be aware that agreements to meet schedules for other projects are as important as their own deadline. Putting a schedule in writing ensures accountability for all parties.

Planning the concept: Major communications projects require critical planning time. The project coordinator should allow sufficient lead-time before production to outline the purpose of the publication and to plan the content. Particularly when departments are creating new publications or redesigning existing projects, a focus group or survey helps to identify the goals a publication should satisfy. A written statement of purpose can be modified following discussion or distribution of a questionnaire.

Approval of design concept and text: The appropriate division director should review the design concept and content of key publications, including the annual report, course catalog, NCSSM magazine, information book, student recruiting publications and application form.

The Communications Office should be provided text that may be edited for style and fit within the design. The office uses the Associated Press Stylebook as a reference for all publications. The NCSSM style manual is included in this guide as a reference for frequent usage. Copy for publications should be submitted by e-mail or as a Microsoft Word attachment. These guidelines for copy preparation, will assure that text for the publication is produced the most cost-effectively:

- Let type wrap within paragraphs.
- Use a double return to create a new paragraph. Do not indent.
- Use a triple return to create an open line space.

Key publications should be produced with consultation from a professional graphic designer. Be sure to consider the costs of services such as desktop publishing or typesetting, and design services within your budget. These technical professionals work for an average of \$30-40 per hour in the Triangle area.

State Printing Services

NCSSM does not operate a printing facility; therefore, services beyond the capabilities of the Copy Center equipment require use of state government printing services or contracting for commercial printing. The University of North Carolina Printing and Duplicating Center (962-5566) will accept NCSSM jobs that work into their schedule since the school is an affiliate of UNC. The State Government Printing Office (733-4199) or Correction Enterprises in Raleigh (733-7198) can print small jobs at competitive prices. NCSSM uses these state services whenever possible, if quality standards and deadlines can be met. Only the NCSSM Communications or Purchasing Offices are authorized to contact these printing services.

The Office of State Printing Guidelines, Executive Order 83, direct that the Department of Administration forward as many printing requests to state-owned facilities as possible. Decisions are based on the equipment, capacity, turnaround time and price most satisfactory to the department requesting the work. Exceptions to these guidelines include intra-agency handling of printing requests, direct agency contact with Correction Enterprises or other state-owned printing facilities, when a Division of Purchase and Contract Term is in effect, or when a specific exception has been granted to an agency.

As of July 1990, state purchasing granted NCSSM permission to procure printing for requisitions up to \$10,000 without approval from the purchasing division because NCSSM is an affiliate of UNC. For printing in excess of \$10,000, a requisition must be sent to the state for approval.

Competitive Bidding

Departments may submit a Small Purchase Authorization form to their budget supervisor for commercial printing jobs of less than \$100. All commercial printing costing more than \$750 requires three competitive bids that are obtained by the Communications Office.

The Purchasing Office has specified the procedure for completing the Purchase Requisition form and telephone quotation sheets. The Communications Office will secure written bids from three vendors for printing requests up to \$10,000. Print projects that will cost over \$2,000 must be bid out by the Purchasing Office.

Desktop Publishing versus Typesetting

Desktop publishing has revolutionized the production of publications. In general, unless there are graphics or photographs in a publication, laser output is generally sufficient for publication purposes. The Communications Office can help determine when professional output is required and arrange for typesetting.

Design and Layout

As NCSSM develops a family of publications, strategic decisions are made about the image and message each piece projects. Skilled designers can help the school project a consistent graphic identity through our publications. The Communications Office can provide advice about basic layout, handle many jobs directly, and recommend and secure contracted design services when needed.

Proofreading, Bluelines and Press Proofs

Proofreading is more than comparing the original text with typeset copy. The proofreader (typically the project coordinator) has the responsibility to question the original copy when it contains obvious errors of context or content. Careful review is particularly important when copy has been heavily edited. Editors suggest reading copy backwards or from the bottom up, to detect spelling or typographical errors, before reading the copy for content. The Communications Office will expect you to proof and approve your copy after corrections are made.

A proof will be provided to the project coordinator for any publication that is in production. Proofs range from type galleys or duplicated layouts, to bluelines and press proofs.

Blueline proofs represent exactly what will be printed. They are made from negatives that are shot from the mechanical layouts. The Communications Office will inspect bluelines thoroughly for specks, spots, broken letters, and for cropping and positioning of photographs. The project coordinator should clearly mark corrections on the blueline, and keep a photocopy. Remember that typesetting and layout corrections at this step will be expensive.

Press proofs are reviewed by the Communications Office or designer while the job is being printed. Press proofs enable the Communications Office to check for correct paper, ink color, coverage and multi-color registration. The proof will also be checked at this stage for specks and broken letters. Providing a press proof to the client is expensive; NCSSM requests press proofs only for key publications, since changes to the job at the press stage are very expensive. Careful attention during early editing and review by all parties who must sign off on the design is more cost-effective and efficient for meeting deadlines.

NCSSM STYLE MANUAL

Use of the Name, the North Carolina School of Science and Mathematics

In 1978, a 28-member planning committee appointed by-then-Gov. James B. Hunt, Jr., recommended establishment of the "North Carolina School of Science and Mathematics" as the nation's first public, residential high school for science and mathematics. These are the only correct usages of the school name:

- North Carolina School of Science and Mathematics - Established in legislation
- The North Carolina School of Science and Mathematics - Titles on documents or usage at the beginning of a sentence
- N.C. School of Science and Mathematics - Conforms to Associated Press Stylebook
- NCSSM - Second reference, no periods

The usage for the named buildings is as follows:

- John Friedrich Educational Technology Complex
- ETC - Second reference, no periods
- Charles Eilber Physical Education Center

- PEC - Second reference, no periods

Campus Address

Publications for external distribution should display the NCSSM address, as follows:

The N.C. School of Science and Mathematics
P.O. Box 2418, Durham, NC 27715
(919) 286-3366

The University of North Carolina

NCSSM is an affiliate school of the University of North Carolina. When referring to the 16 constituent universities in the UNC system, use a lowercase "the" with the exception of The University of North Carolina at Chapel Hill. Lowercase the word "system" in all references. Use solid acronyms with no hyphen with all schools, except UNC-CH, i.e. UNCG, UNCC, UNCA. This is the form preferred in the stylebook for the UNC School of Journalism.

The Associated Press Stylebook

The NCSSM Communications Office utilizes the Associated Press Stylebook for editing all publications that should conform to journalistic style. For information about spelling and punctuation, the AP recommends the Webster's New World Dictionary. All publications distributed to the public should conform to this style. This guide outlines a basic style sheet that follows.

Capitalization, Titles and Academic Degrees

Capitalize proper names of NCSSM departments, boards, committees, offices, agencies, programs and course titles. Lowercase the word "school" when referring to NCSSM and other references to department, committee, etc., when they stand -alone; generic titles (such as "instructor.")

Capitalize a title before a person's name, but lowercase the title following the name. Long titles should be placed after the name. (Chancellor Jerry Boarman or Dr. Joan Barber, director of student life.)

Lowercase the names of academic disciplines with the exception of proper nouns, i.e., English or chemistry courses. Capitalize the name of an academic degree, but not the field of study, unless it is a proper noun: Master of Science in biology; Master of Arts in French. Use lowercase in general reference to a degree, such as master of arts degree. Abbreviations for academic degrees require periods: B.A., M.A., Ph.D. Note that "doctorate" is a noun and "doctoral" is an adjective.

Identification of Students

The NCSSM Communications Office has adopted a style for identifying all current students by their class and hometown: John Jones ('98, Raleigh) and Susan Smith ('00, Manteo). At a statewide school, it is important to recognize the student's hometown. All publications and news releases should conform to this style. .

Alumni are identified only by the year of their graduation from NCSSM: Susan Smith '98.

Abbreviations, Numerals and Dates

Use abbreviations on second reference for NCSSM, the name of a course, or academic and professional titles before names (Dr. Jonas Salk or Gov. James Hunt.)

Spell out the names of organizations on first reference, but use the initials (without periods) or the acronym on second reference. Use no spaces between letters of abbreviations with internal periods, such as N.C. or Ph.D. Initials of a person's name, however, are followed by spaces.

Do not abbreviate:

- Names of countries, except U.S., or names of states, except in addresses, in first references;
- The word "percent" except in statistical copy;
- The words company, corporation, incorporated, industries, etc., when they are part of an entity's formal title. Use the exact company style.

Spell out the numbers one through nine, but use numerals for 10 and above, except at the beginning of a sentence, according to the *AP Stylebook*. Use 8 AM (but 8:30 AM) not 10:00 AM or 10 o'clock in the morning.

Spell the name of a month when it stands alone or with the year only. Spell out March, April, May, June and July in all references. Abbreviate all other months when they are used with a specific date. Formal NCSSM programs are an exception to this rule. When a phrase refers to a month, day, and year, set off the year with commas. Use of the current year is unnecessary in news releases and informal announcements.

Hyphenation

Hyphenate compound modifiers, such as full-time job or part-time employee. But use: Employees work part time or full time. Never hyphenate compound adverbs ending in "ly," such as a heavily traveled road. Consult the Associated Press Stylebook or Webster's New World Dictionary for hyphenation questions.

Punctuation

The *AP Stylebook* recommends elimination of the final comma in a series: NCSSM offers calculus, physics and English. The exception occurs when an integral element in the series requires a conjunction: Students may take English or French, calculus or physics, and chemistry.

Use a comma after digits signifying thousands (1,753 graduates), but not when reference is made to temperature or date, i.e., 5000 degrees or 1492 A.D.

Avoiding Sexist Language

Eliminating sexist bias from writing can be accomplished with awareness about the connotations of language. Replace personal pronouns with phrasing that is gender-neutral whenever possible:

"NCSSM students are encouraged to develop their special talents in science and mathematics. Instructors are committed to students." (No gender reference is necessary.) .

Do not use "he or she" or "s/he." If a personal pronoun is essential, use one gender. Avoid collective nouns or titles with masculine roots, such as freshman, congressman, fireman or mankind. Instead, use first-year student, chair or presiding officer, congressional representative, people or humanity.

Describe NCSSM students as young women and men, not girls and boys. Unless academic titles are used, refer to both genders by last name only on the second and subsequent references, rather than using a courtesy title (Mr., Mrs., Ms. or Miss).

Avoid sexist adjectives such as feminine or masculine, etc. Eliminate sexist salutations in letters when the name is not known. Use the specific title whenever possible. Dear Colleague or Dear Friend may be appropriate if the title is not known.

PUBLICATIONS TRANSMITTAL FORM

NORTH CAROLINA STATE PUBLICATIONS CLEARINGHOUSE

G.S.125-11 requires that all publications be SENT to the Clearinghouse within 10 days of issuance.

1. AGENCY NAME: DATE:

DIVISION: NO. OF COPIES INCLUDED:

2. TITLE:

3. AUTHOR(S):

4. PUBLICATION DATE:

5. IS THIS PUBLICATION PART OF A SERIES? NO _____ YES _____ If yes:
SERIES NAME:

WHAT NUMBER IS THIS PUBLICATION IN THE SERIES?

6. FREQUENCY: ON TIME _____ ANNUALLY _____ IRREGULAR _____
MONTHLY _____ OTHER, SPECIFY _____

7. AVAILABILITY: AVAILABLE FREE _____ AVAILABLE AT A COST
OF _____

DISTRIBUTED FREE TO LIBRARIES _____ DISTRIBUTED TO
SCHOOLS _____

NOT AVAILABLE FOR DISTRIBUTION _____

8. THIS REPLACES AN EARLIER PUBLICATION TITLE: (please state earlier title)

THIS DOES NOT REPLACE AN EARLIER TITLE _____

9. IS THE PUBLICATION COPYRIGHTED? NO _____ YES _____ If yes, please attach a
completed COPYRIGHT RELEASE FORM. (also found in this Handbook for State Agencies)

SENDER'S NAME _____

PHONE: _____

SEND TO: N.C. State Publications Clearinghouse

Documents Branch

State Library of North Carolina

4643 Mail Service Center

Raleigh, NC 27699- 4643 State Courier No.: 52-31-33

TELEPHONE: (919)807-7436 Swayzine McLean

SUMMARY OF NCSSM PUBLICATIONS POLICIES AND PROCEDURES

The NCSSM Communications Office is a consultant and clearinghouse for all publications distributed to the public. Processes for review and approval are outlined in the guidelines section of this document. The office directly supports the mission, goals and priorities established by the NCSSM community with the executive director, Leadership Council and Board of Trustees. Establishment of quality standards and reflection of the NCSSM mission and goals in a consistent family of publications are priorities for the office. The following entries are summaries of other procedures related to NCSSM publications:

News Releases

The Communications Office is the media's first contact at NCSSM. This procedure helps NCSSM provide consistent information to media representatives with minimal disruption of academic or departmental time. To achieve the same purpose, news releases for all departments and special programs should be coordinated with the office, which has an established procedure and format for release of news to Triangle area, statewide and national media. Hometown news releases are also a priority for the office, which seeks information about student accomplishments, verifies it with the academic department involved, and secures approval from the appropriate division director. News releases should not be sent out in the name of NCSSM without this approval process.

Use of the NCSSM Logo and Other NCSSM Symbols

NCSSM has one approved institutional logo with other logos for other programs such as Development and Summer Ventures. The use of the logo on the front or back cover of all official publications is encouraged. It may be used either in a positive image on lighter background or as a reverse image. The logo, created by N.C. State University for NCSSM, symbolizes the energy of science; the triangles in the logo represent engineering and mathematics.

The NCSSM mascot is the Unicorn. The school motto is: "I accept a greater challenge." The Latin translation is: "Maius opus moveo."

School Ink Colors

It is practice at NCSSM to use the school colors, metallic silver and deep blue (PMS 541), on publications. That practice will continue until a graphic identity program is completed for the school. The Communications Office recommends working with professional designers or this office to

create publications that fit into a consistent design for NCSSM publications, though different color selections may be made.

The Summer Ventures program uses ink colors of red (PMS 485) and dark blue (PMS 289) in publications. The Summer Ventures program logo may only be used with the express permission of the program director.