

Evaluation Criteria for National Publication— 1

Below is a chart of the criteria for choosing a publisher for our national publication. We have twenty-four separate criteria defined, which is far too many factors to consider when making a decision. No single publisher can fulfill all criteria, nor will they necessarily fulfill them in exactly the way we desire. As the process moves forward, we will need to refine our criteria and their priorities so we can differentiate between publishers. The twenty-four criteria seem to naturally break into four groups:

1. Ownership—Ownership of the intellectual property rights to the magazine defines our relationship with our publisher and the rights to the product.
2. Strategic Marketing—If we are to fulfill the core objective of building the membership, we will need to market ourselves more effectively than in the past, using our magazine as a key membership benefit.
3. Balance of Content—If we are to fulfill the core objectives of serving and educating the membership, we must publish a magazine that contains meaningful information for our entire membership, each and every issue.
4. Financial Impact—The Swim publication cost is our largest single budget item. As such, it impacts everything we finance for the rest of the corporation and is a silent factor in all our decision-making.

Ownership (Publisher/USMS Relationship)

Evaluation Criteria	Sports Publications	Douglas Murphy	Stratton
1. We want to own the intellectual property rights to the magazine.	Ownership of the magazine resides with Sports Publications.	"USMS will be the sole owner of the magazine including the publication's name and all pertaining materials. DMC will act as a consultant and contractor and lay no claims to ownership of the publication (pg. 7)."	"USMS owns the magazine and contracts with Stratton as a publisher, paid on a fee/plus expenses basis (pg 13)."
2. We want the use of all editorial materials published in the magazine in perpetuity.	" <i>Swim Magazine</i> will continue to allow USMS to have free access to Sports Publication's extensive photo collection and archives at no charge as long as a publishing relationship exists between USMS and <i>Swim Magazine</i> (pg. 8)."	Writers sign DMC contracts which secure copyright for USMS (pg. 2). We pay for or provide photographs. Rights to photos will have to be secured.	Does not specifically address this issue. Contractual relationships will have to be agreed to secure copyright for USMS from writers and/or photographers.
3. We want a publisher who will work in consultation and cooperation with us.	"The development of the [editorial] calendar is a result of a good close working relationship that has evolved over the years among <i>Swim Magazine</i> , the USMS editor and various USMS committees (pg. 3)."	"Working in full partnership with USMS, DMC will begin the process of developing a new magazine with an in-depth strategy session to address and integrate the association's mission-critical goals...with the magazine's editorial, design and advertising plan for the upcoming year (pg 1)."	"Our first step as USMS's publisher would be to meet face-to-face to learn more about your goals and objectives and explore how best to address those in a new magazine (pg 9)."

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<p>4. We want to have input on the editorial calendar, cover selection, and appropriateness of advertisements.</p>	<p>"The role of USMS in determining editorial content in <i>Swim Magazine</i> is reflected in the mutually approved editorial calendar (pg. 5)." On cover selection—"A mutual decision is usually achieved...USMS has the final decision, unless such decision were to have an economic impact on <i>Swim Magazine</i> (pg. 5)."</p>	<p>The USMS editor will work with DMC in the annual planning meeting as well as aspects of managing each issue (pg. 2).</p>	<p>"At Stratton, our approach is to publish a magazine in cooperation and partnership with you...Our job will be to recommend strategies and editorial/design approaches; USMS will have final approval rights (pg.6)."</p>
<p>5. We want the magazine to integrate with our web site to extend it's value beyond the publishing date.</p>	<p>"<i>Swim Magazine</i> will continue to educate, motivate and inspire beyond the print media through additional or extended articles on SwimInfo.com...With the ability to go online with <i>Swim Magazine</i> content, we are poised to present the USMS message to a wider and more universal audience (pg. 2)" "Any article appearing in <i>Swim Magazine</i> may be requested by USMS for use on the USMS website, subject to author and photographer release (pg. 5)." "...SwimInfo will provide premium access to all <i>Swim</i> archives dating back to 1992...(pg. 8)."</p>	<p>"In addition to providing issue archives for online posting, DMC will work with USMS to set up a "push-pull" relationship between the magazine and the web site...USMS also may wish to consider working with DMC to create a micro-site specifically for the magazine, with specific online content that magazine readers can turn to for late-breaking news, articles, calendar and swimming event results (pg. 5)."</p>	<p>"We can provide elements from each issue...as well as the media kit, the editorial calendar, and subscription forms to be posted on the Web site regularly...and we will seek to cover key topics from the web site in the news section or, as appropriate, develop feature articles on key issues of interest to members. We'll refer readers to the web, as appropriate, for more information (pg 12)."</p>

Strategic Marketing (Build the Membership)

Evaluation Criteria	Sports Publications	Douglas Murphy	Stratton
<p>1. We want the magazine to be the centerpiece of a national strategic marketing plan aimed at building the membership.</p>	<p>"Swim Magazine has helped with the retention process by reinforcing, on a regular basis, the values and goals of the organization (pg. 2)." "...the following options to grow the membership are still available to USMS as offered in past agreements...(pg. 3)."</p>	<p>"An exclusive USMS magazine will go a long way toward enhancing the value of membership and also serving as a recruitment tool for expanding USMS's member base (pg. 1)."</p>	<p>"As the association's official magazine, SWIMFIT should serve as an ambassador for the organization—one of its strongest and most visible membership benefits, as well as a member marketing tool (pg. 6)."</p>

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<p>2. We want a re-design of the magazine.</p>	<p>"Swim Magazine reviews the design of its publication to refresh its appearance on a regular basis. A review will take place upon the successful extension of our relationship (pg. 4)."</p>	<p>"DMC will develop a completely new look and feel for the official USMS magazine...The design of the magazine will originate from its name and work inward" and will be created from brainstorming between DMC and USMS. "When the new design is complete, DMC will make a formal presentation to USMS (pg. 4)." No sample design included in the proposal. Editorial content discussion on pg. 3 covers the proposed magazine content.</p>	<p>"Create new name and design look for the magazine, working with USMS for final approval. Stratton will develop a number of design options, for USMS's review, and then implement the final design, based on the association's decision (pg 9)". Sample design presented in proposal, including a suggested editorial format and content for a 48-page magazine.</p>
<p>3. We would like to change the name of the magazine and/or the way it is presented on the cover.</p>	<p>Not addressed or suggested in the proposal.</p>	<p>"A name will be selected for the magazine, with ample time allowed for trademark research and approval steps internal to USMS (pg. 2)."</p>	<p>See quote above on redesign issues.</p>
<p>4. We want the USMS information to fit seamlessly within the context of the magazine.</p>	<p><i>Swim Magazine</i> recognizes that a publication needs to flow from start to finish. Therefore, every editorial page must be relevant to the USMS audience in both design and content (pg. 4)."</p>	<p>"Rather than having a 'proprietary' section for USMS, the entire magazine will be designed to fulfill that mission. Specifically, DMC will work with USMS to develop an energetic association news section. (pg. 3)"</p>	<p>"News department with 3-4 pages monthly, plus calendar of events...a set number of pages for house ads, such as two or three pages each issue (pg 12)."</p>
<p>5. We want a publisher who is dedicated to enhancing the maturity and quality of the magazine as USMS grows in size, diversity of members, and scope of services.</p>	<p>Proposed 12-year contract, but no growth plan.</p>	<p>Not specifically discussed. Bid focuses on the 3-year contract period.</p>	<p>Not specifically discussed. Bid focuses on the 3-year contract period.</p>
<p>6. We want the magazine published bi-monthly.</p>	<p>"Swim Magazine will continue to deliver a quality bi-monthly magazine...(pg. 2)."</p>	<p>"DMC will develop a production schedule for the upcoming year, with editorial, advertising, production and printing deadlines for each of the six issues (pg 2)."</p>	<p>"These fees are based on producing six 48-page issues annually...(pg. 18)</p>

Evaluation Criteria for National Publication—4

Balance and Control of Content (Serve & Educate the Membership)

Evaluation Criteria	Sports Publications	Douglas Murphy	Stratton
1. We want the magazine to serve our entire membership (fitness swimmers, competitive swimmers, tri-athletes, cross-trainers from other sports, etc.) and be reasonably balanced in each issue as well as throughout the year.	"...will continue to present material that appeals to all levels of USMS membership...will continue to present quality and diverse content that educates the membership on ways to improve their overall fitness as well as competitive skills...will continue to educate beyond the USMS membership base (pg. 2)"	"Our overriding editorial goal is to produce content that is right for the audience, has the full support of USMS and reflects the association's mission (pg. 2)."	"It is our belief that membership publications need to be targeted strongly to member needs and, at the same time, support association goals and missions (pg.6)."
2. We want our national publication to be an association oriented magazine.	<i>Swim</i> will continue to have a newsstand presence throughout the country...Ten percent of our total print run goes to newsstands...New subscribers may subscribe to <i>Swim</i> via bind-in cards in each issue...will continue to actively promote subscriptions to <i>Swim Magazine</i> via the SwimInfo.com website (pg. 6)."	"In an effort to expand USMS membership, we recommend that the magazine be a members-only benefit (pg 7)."	"We find newsstand sales is an expensive proposition, especially for smaller organizations. Instead, we recommend developing other subscription marketing programs...(pg. 13)."
3. We want a publisher who has experience producing magazines for associations.	Publisher of <i>Swim Magazine</i> and <i>Swimming World</i> .	"DMC has long-standing relationships with trade associations that rely principally on their official publications to communicate with members. In turn, association members view the magazine as a tangible return on their dues dollars (cover letter)."	"Stratton Publishing & Marketing is a full-service custom publishing, consulting, and research firm with 20 years of experience in the association publishing market (pg 3)."
4. We would like a publisher who has experience with swimming or sports related publications.	"...will continue to present itself as the foremost authority on adult swimming (pg. 2)."	DMC publishes <i>Golf Range Digest</i> "Working in close cooperation with our clients, we've launched half a dozen new magazines and completed numerous redesigns that reward readers with compelling design and discerning articles (pg. 11)."	"Since it's founding 20 years ago, Stratton Publishing has worked with more than 150 organizations to start new magazines, reposition existing publications for increased profitability, restructure publishing operations, and improve marketing and advertising sales approaches (pg. 15)."

Evaluation Criteria for National Publication—5

5. We would ultimately like to have a larger publication.	Not addressed in the proposal.	Not addressed in the proposal.	Links an increase in size to an increase in advertising income which impacts the ad/edit ratio (pg 18). To keep the ad/edit ratio the same would require an increase in pages.
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Financial Impact

Evaluation Criteria	Sports Publications	Douglas Murphy	Stratton
1. We want the least impact on our budget as is practical without sacrificing quality.	most expensive	mid-range costs	Least expensive
2. We want a 3-year contract.	12-year term requested (pg. 6)	3-year term requested (pg. 7)	3-year term requested (pg. 14)
3. We want the publisher to take the lead on the nuts and bolts of putting the magazine together—design, editorial calendar, recruitment of authors, photography, etc.	On pages 3–5, the sections titled Editorial Policies, Production / Approach to Articles, Style of Publication, Recruitment of Authors, Management of Proprietary Pages, and Cover Selection, indicate that <i>Swim</i> will take the lead, basing decisions on the approved editorial calendar.	"We are fully prepared to manage the work flow, handle the details and deliver a professional product to USMS (cover letter)." Under Design & Production (pg. 5), DMC assumes responsibility for the rest of the production, including image acquisition. The intention is to determine the needs at the initial planning sessions (pg. 2).	"Stratton will be responsible for assigning all articles; hiring and managing freelancers and member/expert contributors; editing copy; writing/rewriting some departments; proofing all content for style, grammar, consistency, etc.; and preparing copy for layout (pg. 9)."
4. We want the USMS editor to work as an overseeing editor and not as an author of articles or recruiter of writers.	"Selection of topics and length of articles are determined by close and continuous consultation with the USMS editor based on the approved editorial calendar (pg. 4)." "Traditionally the USMS editor has been directly responsible for at least 13 pages of each issue (pg. 4)."	"DMC seeks one primary point of contact at USMS. This person is generally the magazine's editor..."DMC Can manage all writer assignments, or share this responsibility with the USMS editor (pg 2)."	In addition to working with Stratton, the USMS Editor will oversee the work defined under USMS Responsibilities (pg. 10).
5. We want a new media kit.	Not addressed in the proposal.	"Our annual planning session will produce content for a media kit...(pg. 2)"	Media kit will be created annually (pg. 10 & 19).
6. We want the edit/ad ratio to be 60/40 or 70/30.	65/35 (May/June issue)	Not mentioned in proposal.	"...an ad/edit ratio of approximately 25 to 30 percent advertising to 70 to 75 percent editorial (pg. 18)."

Evaluation Criteria for National Publication—6

<p>7. We want to maximize income from advertising sales, sponsorship promotions, subscription sales, etc. to offset the cost of publication.</p>	<p>"<i>Swim Magazine</i> will pay USMS a 3% commission on <i>Swim's</i> annual gross advertising revenue...<i>Swim Magazine</i> will pay a 5% commission to USMS on all sales generated through SwimInfo.com's Swim Shop and originating from USMS or LMSC websites (pg. 8)."</p>	<p>DMC "Advertising commissions will be 25% of net advertising sales...Sponsorship commission will be 20% of net sponsorship sales (pg. 8)."</p>	<p>Stratton "Ad sales management: 25 percent on net ad revenues (gross revenue less agency commission). Covers sales, billing, collections, trafficking (pg. 19)." "Our approach is that USMS owns the magazine, receives all advertising/sponsorship/subscription revenues and pays Stratton reasonable fees/expenses for publishing the magazine (pg. 14)."</p>
<p>8. We want the magazine to help attract sponsors to USMS.</p>	<p>"...<i>Swim Magazine</i> will provide 1/3 column in each issue devoted to USMS sponsors (pg.7)." "<i>Swim Magazine</i> will offer a 15% non-commissionable advertising discount to USMS sponsors who are not active advertisers within the magazine...will provide, via SwimInfo.com, a dedicated page showcasing all USMS sponsors that are in good standing with USMS and Sports Publications (pg. 7)."</p>	<p>"Depending on arrangements currently in place, USMS may find advantages in having DMC's advertising director also sell sponsorships. Because association sponsors and magazine advertisers are often drawn from the same pool, having one sales contact often works best (pg. 6)."</p>	<p>On page 10 under Advertising Sales Management, they propose to enhance revenue incomes by "develop[ing] an integrated strategy to sell advertising for the magazine as well as promote and market sponsorships..."</p>

Basis for Price Calculations—7

Pricing Category	Sports Publications	Douglas Murphy	Stratton
Fee per swimmer	\$8.25/swimmer—Covers all expenses, including absorption of cost increases, but will bill USMS for return postage exceeding \$1,000/year.	N/A	N/A
Management/Editorial Development			
Management Fee		\$3,000/issue	\$8,500/issue
Freelance writing—articles		\$350–\$700/article/issue	\$750–\$1,000/article/issue
Freelance writing—departments		(see above)	\$250–\$300/department/issue
Layout Design/Production			
New design format		\$12,500 (one-time fee)	\$10,000 (one-time fee)
Issue Layout/Design			
Page Layout		(included in Printing)	\$110/page/issue
Cover Design & Mechanical		(included in Printing)	\$500/issue
AAs—design		(included in Printing)	\$75/hour/issue
AAs—production		(included in Printing)	\$55/hour/issue
Art/Photo/Illustration		\$2,000	\$1500–\$2500/issue
Printing/Mailing—48 pages/47,000 copies ¹			
Printing		\$32,875/issue for 47,000 copies	\$20,220/issue
Postage		\$12,000–\$14,000/issue	\$12,024/issue
Advertising Sales Management/Billing			
Ad sales management	97% of gross ad revenues to Sports Publications	25% of net ad revenues to DMC (includes billing & collection services)	25% on net ad revenues to Stratton (gross - agency commission; covers sales, billing, collections, trafficking)
Media Kit		\$4,000/annually	\$14,000/annually
Direct Expenses		N/A	\$500-\$1,000/issue

¹ Douglas Murphy did their calculation based on 40 pages and 47,000 copies, while Stratton based theirs on 48 pages and 43,000 copies. The Stratton numbers were revised upward based on the larger print run. This is crude, but close enough for our purposes. I chose to adjust Stratton because their cost estimates are broken out better and I could convert the actual print costs. Douglas Murphy includes design in the print costs, which would not change regardless of how many copies are printed.

Basis for Price Calculations—8

Optional Expenses			
LMSC Newsletters (camera ready)	Negotiable with LMSC	Negotiable with LMSC—minimum circulation 2,000 copies	\$3,900/issue—4 page black & white newsletter in 43,000 copies ²
Distribution of Additional Materials	Costs developed on case-by-case basis	Costs dependent on materials—will exceed periodical postal rate	\$2,500 for distribution to 10,000 prospects ³

² It appears that Stratton doesn't understand that each LMSC may have their own newsletter.

³ It appears that Stratton doesn't understand that this is a mailing for our entire membership.