

Minnesota State Colleges and Universities Publication Process

Step 1: The planning meeting

The planning meeting is an important first step in the publication process. It is a chance for all parties to clarify the intended audience, the purpose and the overall style or “look” for the publication. Decisions made at this meeting will guide future steps in the process, so it is critical that all key players are present.

At a minimum, attendees should include all who will have an important role in the project. The “client” — the person or group for whom the project is being undertaken — is key, along with the author or authors, the project manager, and those who will be reviewing or approving the publication.

The planning meeting should take place before any research or actual writing has started. Someone in the group should be designated to record decisions. Here are the basic questions that need to be answered at this meeting; depending on the complexity of the publication, others may be added.

1. Who, exactly, is the intended audience? Be as specific and targeted as possible. If the audience is too broad, it may be advisable to produce two or more publications designed for specific segments of the audience, rather than trying to be all things to all people with a single publication that does not meet anyone’s needs.

2. What is the purpose of the project? Again, be as specific as you can. Do you merely want to inform people? Do you want them to take an action? Does the product fulfill the purpose for the intended audience?

3. What is the “product”? Describe the medium that will reach your audience to achieve your purpose. The product may be a publication, such as a brochure or a report, or it could be a Web

site, a video or a conference, or it could be a combination. Spell out precisely what the product or products will be. Make sure that the product is compatible with the audience.

4. What is the tone and style of the publication? Should it be a high-quality, four-color, glossy paper document with professional-looking graphics, or a one-page, text-only tri-fold brochure that can be reproduced on a xerox machine, or something in between? Take into consideration the purpose, the intended audience, your relationship with the audience, your approach and your audience’s preferences when making this decision. Also, think about key political and policy issues. For example, four-color process (necessary if color photographs are to be used) increases the cost and can lead to negative reactions from some audiences. However, some purposes may require four-color process to convey the information or meet the audience’s expectations.

5. Who is the publisher? In most cases, the publisher will be MnSCU, but be as specific as you can about which MnSCU division or office. In some cases, the publisher may be a group of institutions, or a partnership of MnSCU and other organizations. Clarify who will be the chief decision-maker.

6. What is the available budget? This may dictate, to some extent, the size and style of the product.

7. How will the product be distributed? How many copies are needed? Will they be mailed?

8. What is the deadline for publication?

Minnesota State Colleges and Universities: Publication Planning Checklist

Global considerations:

- G Working title:
- G Intended audience:
- G Intended purpose:
- G Define the product:
- G Tone and style:
- G Publisher:
- G Available budget:
- G Recommended distribution:
- G Deadline:
- G Political and/or policy issues:
- G Proposed contents:
- G Shelf life of the document:
- G Special considerations:

Nitty-gritty:

- G Lead decision-maker:
- G Author:
- G Graphic production/acquisition:
(Photos, drawings, maps, charts, tables,
etc.)
- G Editor:
- G Sign-offs:
- G Designer:
- G Software considerations:
- G Printing considerations:

Two more tasks before Step 1 is completed:

Develop a timetable to complete the publication by the deadline, and assign responsibility to make sure the required tasks are completed. **G**

Designate a “project manager” to keep the project on track and make sure that deadlines are met. **G**

Next Step: The design meeting

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Step 2: The design meeting

The design meeting should take place well before the final stages of preparation of a publication. The purpose of the meeting is to make sure the key players agree on all elements of the publication design. It is a good chance to do a mid-point check to make sure everything is on track. The publication designer should be present, as well as the chief author and the project manager, plus whomever will approve the final publication design. Also, bring the notes from the planning meeting.

The design of the publication will depend on the decisions that were made at the planning meeting. For some products (such as those intended for an internal audience only), the design will be simple and will make use of basic word-processing software. For complicated projects, it may be advisable to bring in a designer to help develop a “look” or a style for the publication that complements its purpose.

The designer should be asked to develop a style that will be used consistently throughout the publication. Style includes size and font of text, sub-heads, heads and major titles; style of bullets and other typographical devices; and the page format: number of columns, column widths, and margins. The design should take into account the purpose of the publication and the intended audience; it should enhance the information and make it as easy as possible for a reader to understand. Do not select a design that detracts from the overall theme or message of the publication, or one that overwhelms the information.

The designer also may be asked to propose a treatment of special pages, such as the front and back covers; the inside front and back covers; title page, contents page, the beginning of chapters or sections, and appendices.

Now is the time to think about graphics. Graphic elements such as photos, diagrams, maps, charts, tables and graphs, can help tell your story and make the publication more interesting to read.

Design decisions include placement of graphics on the page; size and font of graphic headlines, labels, map locations, and explanatory text; and use of color. Determine who will supply the information for the graphics, and who will be responsible for producing the graphic in the proper style.

Depending on the complexity of the project, a number of other design decisions may need to be made at this time:

Size and shape: Odd sizes and shapes cost more to produce and can be hard for readers to store; however, an odd size may help a publication stand out in a crowd.

Length: For most purposes, short (no more than 50 pages) is better than long. If the publication is in booklet format, the total number of pages should be divisible by four.

Binding: The cheapest and most common type of binding is the saddle stitch, in which pages are stapled together in the center fold of the publication. Spiral bindings, perfect binding (in which the pages are glued along the spine, like a paperback book), and three-ring binders are other options.

Ink and paper: One or two ink colors (remember, black counts as a color) are the most economical. An unusual paper color can add interest as well. Color, weight and “feel” of the paper will affect the final product. Paper cost is usually one of the largest expenses of producing a publication.

Essential elements: Certain elements must appear in every publication and should be taken into account in the design. Either the MnSCU logo or the words “Minnesota State Colleges and Universities” should appear on the front and back covers, along with the address, the web home page address, and information about providing an alternate format. (Be sure to follow the graphics standards guidelines for use of the name and logo.) A publication date should appear on most

publications.

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Step 3: Editing

Editing is a necessary, and often misunderstood, step in the publication process. It often is not a single step but a process of continuous improvement. Writers and editors share a common goal: To make sure that the publication is as good as it can possibly be.

Writers should be active partners in the editing process. They may be asked to rewrite portions of the report, to reorganize or restructure the document, to add or cut portions of text. This is normal and does not necessarily reflect the quality of the writer's work. Editors should not be capricious or arbitrary, and should be able and willing to explain their reasons for suggesting a change

Before submitting a publication for editing, the project manager should check to make sure the copy and graphics are complete (don't forget to spell-check). Copy should be double-spaced, and facts and numbers should be double-checked for accuracy.

The editor should be familiar with the purpose of the publication, its style and its format. The editor's job is to thoroughly read the copy and all graphics (including heads and subheads) and to suggest and make changes to improve the final product.

Content and structure

Does the publication fulfill the purpose for which it was intended? Does it meet the needs and expectations of the intended audience? Is it clear, easy to read and readily understandable? Are the parts of the document organized in a way that is logical and easy to understand? Is anything missing? Can anything be eliminated?

Text review

Can the text be made to be clearer and easier to understand? Are unfamiliar terms explained? Can unnecessary jargon be eliminated?

It is the editor's job to find and correct typographical errors and grammar and style problems. (A style guide, such as the *Associated Press Stylebook* or *The Chicago Manual of Style*, is a useful reference; "A Sense of Style," published by Minnesota Planning, is a helpful free guide to common style questions.)

Outside review

For some publications, it may be advisable to have individuals review the text who have not been involved in writing or editing the publication. Sometimes, a fresh pair of eyes can serve as a good reality check to make sure the document is clear and understandable.

Formatting and final editing

When editing is completed, the document is ready to be set in its format. This may be done by the designer, or by someone else using a design template or style. Once the document is in its final format, a final round of editing should be done before it is sent to the printer.

During this final round, the editor should check to make sure the design has been followed consistently throughout the publication; that graphics and headlines are properly placed and in the proper type size and font; and that text and graphics elements are properly aligned.

One final read of the text is also in order. This is the last chance to catch typos, errors, dropped words, wrong dates or other glitches that manage to sneak into even the most carefully edited copy.

Printer's proofs

If you have requested your printer to provide you with proofs, you will see the document as it will appear when printed. Check the proofs as carefully as you checked the final formatted document; also check for proper color placement and photo reproduction.

Back from the printer

Do a quick check when documents are delivered from the printer. Check to make sure there are no missing pages or other printing problems. If you find a large number of misprints, you may need to negotiate with the printer to correct the problems.

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Step 4: Debriefing meeting

Now that the document is published, one final step often can be illuminating and helpful: the debriefing meeting. Bringing the original team back together for a final post-mortem is a good way to share ideas about what worked, what didn't, and what could be handled better next time.

Schedule the meeting within a month of the publication's release — long enough away so that early feedback from the intended audience can be taken into account, but not so long that people can't remember details about the process. All the people who attended the planning meeting should be invited, as well as any others who played an important role in the publication process. Designate someone to take notes.

Keep the meeting on a positive note. Celebrate the completion of the document. Congratulate those who contributed. The focus should be on what went right and what could be improved, not on what went wrong and who can be blamed.

Start by reviewing the final product: How does it look? Does it accomplish its intended purpose? Does the design work? Do the graphics enhance

the text? Is the organization easy to follow? Are there any mistakes? (There is always at least one, but the editing process should have saved you from major disasters.)

Also, review the process: Did the project come in on time and within the budget? If not, discuss what could be done next time to make the process work better. Were the deadlines realistic? Did parts of the project take longer than they should have? Had problems been adequately anticipated? By identifying where problems occurred, steps can be taken next time to avoid them.

Examine the role played by outside vendors, if any were used. Was the designer easy to work with? Were you satisfied with the quality of the work done? Did the printing process go smoothly, with no unforeseen delays? Did the vendors meet their obligations?

Finally, what, if anything, would you do differently next time? If the publication is one that is on-going, be sure to record these observations and save them for your next planning meeting.