

I. Introduction

The purpose of this policy is to provide guidelines and standards to be used in all printed and electronic media developed by and representative of the Pennsylvania Historical and Museum Commission (PHMC), regardless of funding source.

The goal of this policy is to ensure consistency in evaluation, development and production, agency identification, contact information, discount, distribution, and deployment processes of all media produced by PHMC. As a means to ensure this consistency, objectives aligned with this goal include definitions, methodology of production, body of review, and compliance specifications.

Publications produced by PHMC are governed by the History Code, Title 37, §306, which outlines PHMC's power and duty to publish historical or archaeological materials directly, or in cooperation with other publishers. The History Code also permits the distribution of PHMC publications to the general public and select regional historical organizations.

Through the Bureau of Management Service's Marketing and Media Division, PHMC publishes periodicals, brochures, booklets, posters, announcements, and softbound and hardbound books.

Since 1915, a publications program has been in place that has featured titles on history, archaeology, arts, biography, collections, and many other topics relevant to documenting Pennsylvania's history and culture.

Beginning in 2007, the division has assumed the responsibility for managing and producing online media (both as dedicated content and media produced in association with print media) through PHMC's Web site (www.phmc.state.pa.us) and its e-commerce bookstore (www.pabookstore.com). The e-commerce bookstore was established in partnership with its non-profit partner, the Pennsylvania Heritage Society (PHS).

II. Alignment to PHMC Mission

As part of PHMC, the official history agency of the Commonwealth of Pennsylvania, the Marketing and Media Division's media development is directly aligned with the agency's mission and vision statements. PHMC media production and distribution preserve Pennsylvania's memory in the form of sharing its history and heritage in deliverable formats for all. PHMC distributed media provides enrichment through education and understanding of Pennsylvania's past to ensure an appreciation of present and future.

III. Marketing and Media Division

It is the responsibility of PHMC's Marketing and Media Division to ensure that this policy is implemented on behalf of the agency. This includes planning and supervising production, establishing budgets and timelines, providing creative services, administering contracts and

initiating purchase documents, providing means of wholesale and retail sales and e-commerce solutions, managing inventory, and acting as the agency's publisher.

IV. Media Formats

Media formats produced by PHMC consist of the following, but due to continually emerging technologies, are not limited to these products: printed brochures, handouts, books, booklets, and pamphlets; DVD video and other digital video formats (i.e. Quicktime and Flash); e-book and portable document format (pdf) publications; e-zine and printed magazine (specifically *Pennsylvania Heritage*) formats; and Web sites, Web communities, Web blog, social media, and e-commerce solutions.

V. Media Topics

Topics and subjects for the development of media can be generally summarized as Pennsylvania history and nonfiction. Specifically, these include but are not limited to these Pennsylvania-based categories of interest: archaeology, architecture, arts, historic preservation, biographies, ethnic studies, government, industry, military history, natural history and science, genealogy, sports and recreation, historic sites, and travel. Within these categories, topics of high priority support PHMC programs and annual themes.

VI. Media Production

Media production and programming are categorized by the following format and delivery methods:

1. Print-published media for free distribution
2. Web-based media for free distribution
3. Print-published media for sale
4. Web-based media for sale

While the primary creative services of editors, designers, and publishers are generally provided by PHMC's Marketing and Media Division for production, partnerships aligned through publishing affiliations may warrant other non-division, non-agency, and freelance staff be employed for media production.

1.) Print-published and Web-based Media for Free Distribution

Free distribution of information in both print and online formats is a critical part of PHMC outreach, promotion, and the agency's core responsibility to educate the public about Pennsylvania history and heritage. Print publications for general audience distribution are discouraged in lieu of online publishing and distribution.

Print publications with specific audience focus such as special topic brochures and other abbreviated formats will, simultaneous or before print delivery, also be considered for PHMC Web site posting.

The text and design of **all** printed and electronic material, including, but not limited, to newsletters, fliers, brochures, rack cards, web sites and other web applications produced for public distribution must be approved by the Chief of the Marketing and Media Division and

appropriate Bureau Director or his or her designee. This includes projects undertaken by a support group or partner organization on behalf of PHMC.

Prior to the Marketing and Media Division beginning a project, work request forms and publications planning documents must be completed and bureau approval secured. The work request must include a complete description of the content and/or changes requested, identified audience, intended outcome, distribution method, expected delivery date, and cost codes. The project may not begin until all approved materials are received by the Marketing and Media Division. A copy of the final draft will be submitted to the requestor and Bureau Director (or designee) before printing or publishing begins. For Web design, a trial/development site may be the working tool used by the designer in cooperation with PHMC's designee before go-live is approved.

2.) Print-published and Web-based Media for Sale

Paid publication creation and sales represent a cyclical merge of commerce and outreach. In addition to its motive to underscore PHMC's mission, the continuing baseline objective for publication sales is sustainability—for sales to support future new media creation and current publication inventory replenishment. Revenue collected through the sale of media is directed to the Commission's Historic Preservation Fund, as designated in the Commonwealth's History Code.

Wholesale: This program provides publications at a wholesale discount to resellers and individuals requesting bulk quantities. Discounts for wholesale purchase of PHMC-published book titles are as follows: one to four books purchased provides a 25% discount, and orders of five or more copies provides a 40% discount. Books that are wholesaled by PHMC but are not PHMC-published titles, a 25% discount for five or more copies is provided.

Retail: This program provides points of purchase enabling customers to purchase both PHMC-published titles and those titles by other publishers acquired for resale by PHMC.

Historically, publications for sale have been printed, but the program is actively encouraging authors to consider e-book publishing as a viable option with downloads purchased through its e-commerce Web site.

VII. Media Sales Locations

Online location www.Pabookstore.com: Provided in partnership with PHS, this location serves as the e-commerce solution for retail sales of media for PHMC.

VIII. Funding

Historic Preservation Fund: Revenue generated from the sale of media is deposited into PHMC's Historic Preservation Fund. Reciprocally, media for sale may be funded from this source with the approval of PHMC executive director. Inventory replenishment and book titles purchased for resale are purchased using this fund. These purchases are subject to the evaluation of the chief of the Marketing and Media Division, based on continuing sales performance and the future potential for sales.

Donations: Donations, grants, and sponsorships for the production of media are actively pursued with solicitation administered through PHMC's development director and by prospective authors who may wish to generate funds for the production of their accepted media by PHMC.

Partnerships: PHMC Marketing and Media Division's currently fosters a partnership with PHS in maintaining Pabookstore.com and *Pennsylvania Heritage* magazine, the latter being PHS's primary benefit to its membership. Based on this model, partnerships to co-publish and produce media continue to be pursued, when possible, to subsidize media production when outreach and programming among the partners is a common goal.

Other sources: Both paid and free media that support specific PHMC bureaus and programs and result in the need for printed publications will be required to provide dedicated funding for production. In many instances, this funding may originate from PHMC's state-funded budget, Historic Preservation Fund, grant funds, or program partners and sponsors.

IX. Media Evaluation and Planning

Evaluation of media is initiated by three submission methods:

1. A formal proposal is provided by submitters outside the agency.
2. A request for media is submitted as part of the agency's communications procedures.
3. A request is submitted as part of the Marketing and Media Division work order procedures.

An internal workgroup consisting of the agency's publisher, marketing director, development director, and magazine editor will review the submissions and evaluate for applicability and consistency with agency mission, program, or specific theme; audience delivery and reach; funding; mode of delivery in lieu of emerging digital technologies; and compliance with Commonwealth of Pennsylvania communications policies.

Evaluated submissions to be considered for book production (both print and e-books) shall be forwarded to the PHMC Publications Committee to provide further advice on selected submissions. Books selected for production are then subject to approval by the Bureau of Management Services director and by the PHMC executive director. Solicitation for authorship for media such as published books will follow the same evaluation and approval procedures.

X. PHMC Identification

The name of the Pennsylvania Historical and Museum Commission will be clearly displayed on all printed material. Printed promotional material of an ephemeral nature, such as the Pennsylvania Trails of History™ brochures, rack cards, posters, conference brochures, and similar printed pieces should include the name of the Commission, a return address, a telephone number for further information, ADA information (where applicable), and PHMC's Web site.

All other printed materials should include all of the above, as well as the names and titles of the governor, PHMC chairman, and the executive director.

All contracts with outside publishers for co-publication or publication relating to PHMC historic sites, museums, and collections should credit PHMC on the title page and in the acknowledgements, preface, or introduction.

All printed materials prepared and published by associate support groups for any PHMC historic site or museum (including The State Museum of Pennsylvania) must state that the facility is "Administered by the Pennsylvania Historical and Museum Commission in partnership with the (name of support group)."

PHMC logo style, configuration, and use are defined within specific and established Commission policy.

All Web media and other PHMC online initiatives and partnerships will maintain a selectable link to the PHMC Web site. Please check with the marketing and media division chief for appropriate URL.

XI. Complimentary Distribution

Complimentary distribution of new and revised print media is provided within the guidance of the Marketing and Media Division and is subject to compliance with the requirements of the History Code.

XII. Updates to Policy

Future revisions to this policy will be developed by the Marketing and Media Division chief in counsel with the PHMC Publications Committee chair for review and submission to the Publications Committee prior to motion for approval by the PHMC Board of Commissioners.