



Publications Planning Guide

or “Do I really need a publication?”



ou’re thinking you need a publication to communicate about your department or an event you’re planning.

Or maybe your supervisor has told you that you need to do a newsletter to let a certain group of people know the latest happenings in your area. Before you go any further, take some time to go through the questions below. It will help you clarify your thinking about whether you really need a publication, and—if you do—how to go about producing one.

I think I need a publication...

1. Title or description of proposed publication:
2. Who is the main contact person for the production of this publication?
Person:
Title:
Department:
3. What is the main message am I trying to communicate?

4. Can this information be distributed through another means instead of spending money on a publication?

Have I thought about using

- Caltech Today (including its online calendar)
- Caltech 336
- Caltech News
- Engineering & Science
- a special website
- news release
- e-mail
- phone
- letter
- special event

5. Audience(s). Be specific:

- on campus off campus

Demographic information, such as age(s), gender, socioeconomic characteristics, etc. What is the education level of this audience?

6. What do I want my audience to do?
What specific action do I want them to take?
Return a postcard, call for information, attend an event, send money, or do I just want them to think good thoughts about Caltech?

OK, I'm really sure I need a publication to communicate to my intended audience.

- 7 I think I need a...
- letter flyer poster
 - invitation newsletter
 - brochure booklet
 - presentation folder with inserts
 - direct mail package catalog
 - e-mail notice a website
 - other
8. Do I have samples of previous publications or samples from other universities that have impressed me? Do I have competition? If so, have I studied their materials? Do I know what makes my message different from my competition and more compelling?
9. Quantity:
Planned shelf life of this piece:
10. I think I want my publication to be the following size:
- Final size:
Overall size (for folded pieces):
Number of pages:
- self cover separate cover
 - Folding Scoring Perforation
 - Binding
 - Saddle stitch (staple) Spiral
 - Comb Perfect
 - Bleeds
- Do I know this is the most efficient, cost-effective format for my message? Do I know this is the format that will best communicate my message to my audience?
11. Due date:
Do I need the total order by that date, or could I settle for a partial delivery?

I am thinking I want to direct the production of the publication myself.

- I know, as the project director, that it will be my responsibility to make sure all the pieces of this publication come together in a cost-effective and timely manner. Here is the team I have put together:
- Client and final approver of the publication:
 - Writer:
(If it's me, do I really know how to write? Am I aware that Caltech uses the Chicago Manual of Style? Do I have time to write? Is this the best use of my time?)
If I need to hire someone, do I know where to find the right writer for this project? Have I thought about calling Publications for a referral?
 - Designer:
(If it's me, what do I know about graphic design? Do I know whether my printer can print from what I give him or her? Do I really have the time and expertise to handle this job? Is it an efficient use of my time?)
If I am planning to use someone who does desktop publishing from their computer, what else have they done, and did I like it? Is that person right for the scope of this job? Do I understand that my audience (e.g., internal vs. external) should determine the level of design that is appropriate for this piece?
If I need a professional graphic designer, do I know how to find one? Have I thought about calling Publications for a referral?
 - Illustrator:
Do I have existing illustrative material?
If I need illustration, do I know how to find the right illustrator?
Do I know what style I want?
Should I have my designer do this instead?

- Photographer:
(If it's me, do I know I can produce the quality of photography this job demands?)

Do I have existing photos? Do I know if my printer can work from my materials (i.e., digital images, negatives, prints, transparencies)? If I have digital images, do I know which format they were saved in and the size and resolution of that file? If I need photos, do I know where to find a good photographer? Am I aware that the Publications Office has a full-time photographer on staff? Am I aware that graphic designers often hire and art-direct the photographers?

- Printer:
Does my job fit the presses in Caltech's Graphic Resources department? If I need an outside printer, do I have the names of reliable, high-quality printers? How do I know if they are suitable for this particular printing job? How do I know that my job fits their press sizes and length of run? Have I thought of contacting Graphic Resources, Publications, or Purchasing for referrals or help? Have I prepared a specification sheet and requested bids from three printers? Do I know what to include in a specification sheet?

Do I know what kind of paper I want to use?

- coated (glossy, dull, or matte)
 uncoated (textured or smooth, color or white, flecked or not)
 recycled

Do I know how many colors of ink I need to do this publication effectively and cost-efficiently?

- one color
 two colors
 three colors
 four-color process
 four-color process plus additional colors
 varnish

Do I understand the differences—cost, quality, timing, etc.—between the different processes?

What does all this mean? I need help!

Actually, I could use some help from Caltech's Publication Office.

I understand they offer some of their services at no cost!

The Caltech Publications Office is staffed with professional publication managers, editors, writers, proofreaders, a website specialist, and a full-time photographer. This office produces a wide variety of publications—from the *Annual Report* and the *Caltech Catalog* to various department brochures, newsletters, fundraising solicitations, and invitation packages.

If their schedule permits, the Publications staff will manage the production of your job and assist with writing, copyediting, and proofreading at no cost to you. As project managers, the Publications staff will recommend and help select your project team. They will also provide you with estimates for any outside costs and keep you informed about how your publication is progressing.

As the client, you will define the purpose of your publication and provide the input necessary to convey your message. You will also define the due date(s) and budget. Your budget will pay for the cost of design, illustration and/or photography, and printing, with no additional markup. If you need writing assistance, and a Publications writer is not available, your budget will also pay for a freelance writer. You will have the opportunity to approve comps (design mockups) and read proofs in various stages (including blueline).

If the Publications staff's workload won't allow them to manage your entire project, or if you decide to manage it yourself, you are still encouraged to call on them for free advice and consultation.

Now that I figured out how I'm going to produce the publication, how will it be distributed once it is printed and delivered?

19. I plan to distribute this
- by hand (how many by hand)
 - by mail first class
 - second class
 - third class
 - bulk
 - other
20. Do I need an envelope or is this a self-mailer?
- have envelope (size?)
 - need envelope (size?)
 - self-mailer
21. Do I have my mailing lists?
Whom do I need to contact to get them?
22. Do I want to put this publication on my website? If so, who is going to do that?
(Do I need a website? Or is this information already available online?)
23. Who pays for the costs of producing this publication?
Maximum budget:
Account number:

Are more funds available from other sources?
Does anyone else on campus have a use for this publication?
Am I planning on charging back other potential users from around campus (e.g., Development)? Yes No

One last note: Please understand that delays in the production schedule will result in delays of delivery. Delays in production can arise from changes made in the job at any stage. These delays may also increase the costs of the project. Costs for changes can increase at each succeeding stage of the project.

This planning guide is provided by the Caltech Public Relations Office.

If you

- want more information on how to produce a publication,
- need help in actually producing a publication, or
- need some assistance in thinking through a communications problem,

please call the Publications Office
at extension **6615**.

We would be happy to help you!

