



American Society of
Business Publication Editors

Guide To Preferred Editorial Practices

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*Started in 1964, ASBPE is the only
professional society strictly for editors and writers
of business, trade, professional, and association
magazines, newsletters, and digital publications*

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Introduction

Business-to-business (B-to-B) and other industry publications exist to serve their readership in the specialized fields they cover. To provide this service effectively, editors must maintain editorial excellence and the trust of their audience. These attributes are built on a publication's constant attention to reader needs and on a publicly expressed dedication to such journalistic principles as:

- accuracy,
 - fairness,
 - balance,
 - full attribution to sources,
- and

■ clear separation of news from analysis, news and analysis from opinion, and of editorial from advertising content.

These guidelines are an integral part of ASBPE's dedication to strong journalistic principles and high standards, which the organization instills in its Awards of Excellence program, conferences, online operations, chapter meetings, and other programs.

The guide is designed to offer ASBPE members and non-members operational guidelines. Al-

though the guidelines are non-binding on ASBPE members and others, ASBPE reserves the right to cite any disregard of the guidelines as grounds for disqualifying entries in the ASBPE Awards of Excellence or otherwise to call attention to the publication's behavior.

Ethics Guide Transparency

ASBPE urges business, trade, association, and professional publications to adopt some code, whether ASBPE's or not. ASBPE also urges publishers and editors to make their ethical standards transparent both for its internal staff and externally for its readers, advertisers, and others in their markets.

ASBPE's Web site, www.asbpe.org, offers links to the codes of selected journalism organizations and B-to-B publishers.

I. Conflicts of Interest

Only the editorial staff should make final editorial decisions. In all ways, editorial coverage must be based solely on reader needs in the view of the editors. Ideally, this judgment is informed by a clear mission statement

agreed to by the publisher. All dealings with non-editorial personnel — especially advertisers and public relations representatives, but also story sources — should be conducted with the clear understanding that no preferential editorial treatment should be expected from the interaction and that the journalistic principles stated in the Introduction and elsewhere in this guide will be followed.

A. Contacts with Advertisers and Advertising Sales Staff

Editors should never be held responsible for soliciting advertising. If they do accompany ad sales personnel on calls, it should be with the clear mutual understanding that the meeting won't result in preferential editorial treatment. The following should govern the role of an editor as it relates to advertising:

1. Productive Editorial-Advertising Relationships. Editors are encouraged to have a productive working relationship with advertising sales staff. While editors may refer potential advertisers to ad sales staff and consult with ad sales staff on story ideas, it is imperative to make clear to everyone at a publication that final decisions about editorial content rest with the editor, and final decisions about advertising sales rest with advertising sales staff.

2. Sales Calls. If editors accom-

pany ad sales staff on sales calls, they should clearly state the reason for their attendance. Such reasons may include explaining editorial policy and direction, describing the readership, and discussing industry trends.

3. Story Leads. If editors accept story leads from an advertiser, they should explain that rigorous editorial evaluations go into determining if the information will be used.

4. Advertising Negotiations. Editors should not be involved when any advertising consideration, such as a contract or a payment, is discussed.

5. Job Titles. Sales and business personnel should never use job titles that seem to describe an editorial function. If the editor/publisher title, or one similar, is used, the individual must make clear to the advertiser whether the individual is acting as editor or publisher, and must ensure that editorial, advertising, and corporate responsibilities are kept separate.

B. Treatment of Advertisers, Public Relations Personnel, and Sources

Favorable editorial coverage or preferential treatment in an article must never hinge on the prospect of ad sales, financial gain, or other factors that are not related to editorial integrity.

1. Article Previews. Generally, non-editorial personnel should

not be allowed to preview an unpublished article. Exceptions include experts, editorial advisory board members, or other sources who will receive no benefit from the article. This also applies when a company or public relations person suggests an article. However, when a source or a company is referred to in an article, it may be acceptable for the editor to ask that the source review quotes or sections to ensure accuracy and clarity (also see Part II-A).

2. Negative Content. Advertisers may be informed in advance of any editorial material that may be viewed as critical of the advertiser, so that the advertiser may withdraw an ad from the issue.

3. Editorial Review. Editors should review, before publication, all advertising-supplied content for sponsored projects or articles, special-advertising sections or supplements, or other content that advertisers or sponsors may have provided to ensure that ethical guidelines are followed (also see Part IV). Editors must also have the right to reject copy that violates the publication's editorial policies.

4. No Quid Pro Quo. There should be no trading of advertising for editorial or editorial for advertising.

5. Public Relations Personnel. These guidelines outline preferred procedure in dealing with public relations personnel during

the preparation of material for publication:

a. If the contact involves arranging for an expert author to produce an article, at an editor's request, the author should be identified as a guest contributor, with company affiliation and job title clearly listed. The article provided should meet all editorial requirements set by the editors, and should be edited in the manner of staff-generated or freelance-contracted content.

b. Public relations personnel may be asked to help arrange contacts with key sources.

c. When an article idea originates in a public relations department, it is logical for editors and reporters to seek more details from this and other sources.

d. When additional interviews are needed, public relations practitioners may help make appointments and advise editors on appropriate personnel with whom to speak.

e. Public relations personnel are logical sources to provide editors with suitable illustrations to accompany articles, and company clearance for those illustrations, or for designated personnel to speak to the editors, when needed.

f. When the same person handles advertising and public relations responsibilities, a clear distinction should be

maintained between the two functions. It is advisable, however, for editorial to seek an alternative source in any case in which a conflict may result.

C. Advertisement

Agencies, Use of Trade Names in Editorial, Product Placements, and Advertising Design

Generally, an advertisement should not appear next to related editorial, to avoid the appearance of partiality or advertiser involvement. Exceptions include buyers' guides, directories, annuals, or other ad-sponsored sections or supplements.

Where appropriate, it is preferable to use generic names of products or services in editorial. When product names are mentioned in editorial material, the trade name alone should be used, without trademark and similar symbols, and capitalized to show that the name is a proper noun.

It is not acceptable to receive paid or implied compensation to mention a brand or place the picture of a product in editorial content.

All advertising should have a design different from editorial, at least in typeface and layout. Advertisements that may be confused for editorial content should be clearly labeled at the top of the advertisement with the word "advertising," "adver-

tisement," or similar designation, but never the word "advertising" or similarly confusing terminology.

D. Gifts to Editors and Writers

Generally, editors and writers should not accept gifts from editorial information sources, advertisers or prospective advertisers, public relations personnel, or agents acting on behalf of these parties. Further, editors should explicitly discourage such gift-giving. If gift-giving is an established custom, or is otherwise difficult to avoid completely, these guidelines apply for acceptable gifts.

1. Modest, souvenir-type gifts commonly given out at press affairs or conferences, or distributed to large groups of editors or individual editors during traditional gift-giving seasons, are generally acceptable.

2. Modest gifts sent to a large number of recipients are generally acceptable, although even a modest gift sent to a single recipient should be avoided.

3. Money or lavish gifts for single recipients or a select few are not acceptable.

4. Avoid acceptance for personal use of "samples" or gifts of items, products, services, or other valued commodities that are or may be the subject of editorial mention. In the case of samples or copies of books or software being pro-

vided — for products reviews or for use in the publication’s understanding of a subject, for example — it is advisable to return them after use or to dispose of them. Expensive products provided for such editorial use should always be returned.

5. A publication should pay or split the cost for meals purchased in the course of discussing editorial matters with a source, a public relations representative, or an advertiser.

E. Travel, Entertainment, and Junkets

In the case of transportation, lodging, entertainment, and personal expenses incurred in connection with editorial coverage, the publication or the staff member is responsible for payment. There may be exceptions, however, including the following:

1. Junkets. In the case of group press affairs attended by editors from more than one publication — so-called junkets — payment is optional, if the offer to pay expenses is extended by the information source or advertiser/vendor to all participants. As always, common sense should be applied in determining whether there might be a perceived conflict of interest or perception of favoritism in editorial treatment.

2. Speaking Engagements. In speaking engagements at an association, company affair, or conference, accepting reimburse-

ment of travel expenses is optional, if the engagement is a direct part of the editor’s job. Editors may not accept speaking fees, since the speaking engagement is considered part of the editor’s work or job description.

3. Expenses. If someone other than the publication has paid travel and other expenses, the publication should disclose the payments to the readers, if coverage results from the travel.

F. Outside Activities of Editor and Staff

The lives of editors and other publication employees outside the workplace can also reflect on their professional lives. Here are several areas where editors must be especially careful of conflicts of interest, or the appearance of conflicts:

1. Other Employment. Editors and other staffers should not write, work or consult for, or otherwise contribute to, competing publications or their companies, except as permitted by established and authorized business relationships. In doing any freelance work, editors should inform a supervisor, and abide by their companies’ applicable rules. Editors should not hold other non-journalism positions that could represent a conflict of interest with an editorial position.

2. Investing. Editors and staffers should not invest in, or hold stock of, any company that

they will cover or be likely to cover. This constraint generally does not apply in the case of investments held in a mutual fund or a 401(k) plan, or in similar plans that benefit the editor and other group members, and over which the editor does not control sales of individual stocks or other financial functions by which they might gain personally. A prominent holding that could be seen as a conflict of interest, however, is best to avoid in any situation.

a. Editors should abide by all applicable laws addressing insider trading information.

b. Editors should never encourage investment decisions that reflect material in, or prepared for their publications, or involving a company that advertises in the publication.

c. Actual or potential conflicts from investments of any kind made prior to an editor's employment should be disclosed to the proper superior immediately so that appropriate safeguards to avoid conflicts can be instituted.

3. Political, Community, and Business Activities. Editors should be free to participate in civic, political, business, or religious activities that do not present a conflict with coverage or do not lead to a compromise of trust or respect for the publication.

II. Standards for Editorial Operations

The constant attention of editors is required to make sure that the entire editorial function, from preparing material for publication to offering a chance for readers and others to respond after the fact, is conducted fairly and in the readers' best interests.

A. Fact-Checking

Publications should maintain a system, independent of the original reporter and editor, for checking facts in all articles and other printed matter.

B. Anonymous Sources

Sources should be identified for readers except in rare circumstances, for example, to protect the source from the repercussions of speaking to the reporter. If cited anonymously, use the most complete and accurate description of the source possible.

C. Freelancers

The same guidelines governing regular staff should apply as well to paid or non-paid contributing writers, editors, or artists. Editors should respect the right of freelancers to work for other publications, although editors are entitled to discuss limitations, so that the same contributor doesn't have bylined work appearing in a competing publication, for example.

D. Research

In the case of any research, rankings, “best of” or “worst of” awards, buyers’ guides or similar editorial products, a neutral third party, such as a consulting firm, may be used to help avoid conflicts of interest. In any editorial content, a clear and complete discussion of the methodology, including methodological and analytical limitations, should be published to allow the reader to make informed judgments about the value of the content.

E. Feedback Mechanisms

Editors should ensure that their publications are accessible to readers, and should arrange for appropriate feedback, which is treated responsibly if published. These standards apply:

1. Contact Information. Publications should provide a range of ways for readers to offer feedback, including by mail, e-mail, and telephone.

2. Letters to the Editor. Space should be provided in the publication for letters. Editors should make every effort to verify their authenticity. They must also identify the letter’s author except when disclosing the author’s name may cause demonstrable harm to the writer.

3. Corrections. Corrections, clarifications, and retractions should be printed in the next available issue, in a regular, consistent space that is easy for the reader to

find in the front of the publication or, in the case of a Web site, the home page. While it is best to place these corrections, clarifications and retractions in the same area of the publication in each issue, in the case of a major correction it may be appropriate to place it at least as prominently as the original material containing the error.

4. Internal Complaints. Staff and other internal suggestions and complaints about a publication’s operations, ethics, or quality should be taken to the editor of the magazine. If the issue is not resolved through discussion with the editor, the publisher should be informed.

III. Graphics and Photography

Graphic materials must be prepared with the same care and concern for accuracy, fairness, balance, and attribution as the text component. The integration of the graphic and text components, so vital to the overall ability of a publication to present material fully and fairly, must also be done responsibly, to ensure readers’ trust.

A. Photographs and Photo Illustration

Care should be taken not to modify photographic material in ways that might mislead the reader.

1. *Labels.* Photographic illustrations or other computer-generated photos or illustrations should be clearly labeled as such.

2. *Alterations.* Whenever content of a photograph has been altered in a major way, the extent of the alteration and the technique should be clearly explained in a caption/cutline or credit line.

3. *Photo credits* should be published.

B. Charts and Graphics

Information graphics should include an explanation of research methodology and give the source (see also Section II-D-Research). This applies as well to graphics obtained from third parties. Special care should be taken to assure that the charts and graphics fairly and accurately portray the material in the article.

C. Use of the Publication Logo

The publication's logo should never be used for promotional materials unless the advertising is for a product connected with the publication, such as a conference. The logo may also be used in conjunction with buyers' guides, directories, annuals, or with contests or competitions that have the editor's approval and do not mislead readers or jeopardize the integrity of the magazine.

IV. Single-Sponsored Issues, Special Advertising Sections and Supplements

Special advertising sections and supplements, and single-sponsored issues, are a normal part of business, but must be handled responsibly.

A. Single-Sponsored Issues

1. *Labeling and Appearance.* In the case of an advertiser sponsoring an entire issue, full disclosure must be made of the relationship in a prominent part of a publication's pages, e.g. the cover, table of contents, or in a special introduction by the editor or publisher. Special care and explanation must be given to readers to avoid the appearance of editorial content being affected by the sponsorship.

2. *Use of the Logo.* In a single-sponsored issue, the publication's logo may be used, but the editorial content must be held to the same standards that apply for a non-single-sponsored issue.

B. Special Advertising Sections or Supplements

1. *Labeling and Appearance.* All advertising should have a design different from editorial, at least in typeface and layout. Special ad sections and supplements should be clearly labeled with the word "advertising," "advertisement," "sponsored by," or similar designation. The words "advertorial" or "infomercial"

confuse the readers about the nature of the material, and should be avoided.

2. *Use of the Logo.* The publication's logo may not be used with a special advertising section or supplement.

3. *The Editorial Role.* The editorial staff should not assign, write, edit, design, or lay out special advertising sections or supplements. However, editors should review, revise, and approve for publication any advertising section or supplement to ensure that editorial standards are followed.

V. Conferences, Trade Shows, and Sponsored Contests

Specialized coverage and the operation of publication-sponsored contests and rankings present many potential threats to the reputation of the publication. Editors should assure that high standards apply in these areas.

A. Editorial Duties

At conferences and trade shows, the editor's primary duty is to collect news, learn industry trends, attend press conferences and program sessions, obtain articles, and meet with writers, readers, and others. When these obligations are met, editors may use their discretion to meet with advertisers.

B. Keeping Contests Transparent

Rules and judging criteria should be fair and explained fully, and prominently featured, and sponsors and contest judges should be identified clearly in the publication.

C. Contest or Ranking Results

These should not be changed at the request of anyone in order to reflect an outcome different than what actually resulted, for example, to gain advertising or to make an advertiser look better in the marketplace.

VI. Nonprofit, Membership, Professional, and Trade Association Publications

Some industry publications are published by nonprofit professional or trade associations with a mission that their readers or members expect them to promote. When such publications also offer their readers information and advice about their industry, following this guide will help them maintain reader trust, legitimacy, and balance.

VII. Digital Publications: Web Sites, Blogs, E-Newsletters, and Digital Magazines

The editorial department should control all editorial content on a publication's digital publication, including Web site, blogs,

e-newsletters, digital magazines, and others. Standards such as accuracy, attribution, fairness, and balance applying to a publication's printed editorial material also apply to a publication's Internet or digital presence.

Care should be used online, as with printed material, to avoid placement of advertisements in or near editorial content in a way that could compromise editorial integrity or confuse the reader.

Further, digital publications can present a special ethics challenge because hyperlinks of various kinds, which promote user involvement, can blur the separation of editorial and advertising for the average reader. Editors should take steps to avoid possible confusion. The following guidelines are recommended:

A. Declare Editorial Control

Who controls the digital publication should be stated explicitly on the publication's home page, and all pages should carry the publication's title and logo, placed prominently.

B. Identify Advertising Content

Advertising material and publication's promotional "house ads" should be clearly identified on all pages and corresponding hyperlinks. Identity also can be established through disclosure statements for text-based content that non-editorial sources provide, or

with labels, graphics, or other design or written elements differentiating advertising and related mechanisms. Those include links, feedback channels, online subscriptions or memberships, discussion forums, or e-mail for communications, such as sales pitches from editorial content.

C. Identify Special Advertising Sections

Special advertising sections online should also be clearly identified. The publication's normal typography should not be used in special advertising sections, and an advertising notice should be placed prominently on each page displaying the content. See section IV for additional guidelines.

D. Approve Hypertext Links

Whether for editorial or advertising information, hypertext links should be placed at the discretion and approval of editors. Also, advertising and sponsored links should be clearly distinguishable from editorial, and labeled as such, as should click-through pages, which may also contain the publication's editorial content, with appropriate disclosures provided. Such disclosure may include a "use with permission" statement or similar language. Contextual links within editorial content should not be sold. If an editor allows a link, it generally should not link to a ven-

dor's Web site, unless it is pertinent to the editorial content or helpful to the reader. [*Paragraph D. revised, May 7, 2007, by vote of the Ethics Committee.*]

E. Disclosure Policies

Web sites should state clearly their editorial (and advertising and sponsorship) policies for readers including whether, how, and why information is gathered from readers, news sources, vendors, advertisers, associations, government, and other information-gathering means, including cookies, and provide users a way to opt out of any use he or she wishes to decline.

1. Terms of service and privacy policies should be prominently placed or referenced, easily accessed, and easy to understand.

2. Publications should state whether user information is provided to any third parties, including the publications' subsidiaries and business partners, and allow readers to easily opt out of such information-sharing.

3. Provide complete editorial contact information, including a means by which readers can contact specific staff members directly with questions, corrections, or other input. Contact information should include e-mail, regular mail, telephone and fax.

G. Blogs and Other Online Features or Publications

These should be clearly labeled, easily found, and have easily understood user guidelines, including general rules, etiquette, privacy issues, and related policies. Statements concerning expected decorum and the control of an editorial moderator or supervisor over the blogs or other online discussion forums should be explained.

Conclusion

Realizing that new ethical challenges are always arising — including those that reflect technological changes — ASBPE maintains an Ethics Committee to consult with members in using these guidelines, to issue statements as situations warrant, and to recommend revisions as they become necessary.

Through the committee, whose members have their contact information posted at the www.asbpe.org Web site, **ASBPE welcomes recommendations on how these guidelines can be made clearer or more relevant.**

Guidelines for association editors

To better serve association editors, ASBPE has approved guidelines that will become part of this Code of Preferred Editorial Ethics.

The new best practices were developed in partnership with the Society of National Association Publications (SNAP).

Association publications need guidance to maintain standards of objectivity within the context of the association's mission.

"The goals of publications and the associations they represent are one and the same," said Robert Freedman, senior editor of *Realtor*, published by the National Association of Realtors, who oversaw the effort between ASBPE and SNAP to write the new language.

"Editors serve their associations best by ensuring high standards of objectivity in their publications, because with high standards comes the credibility that redounds to the associations' benefit."

Six issues addressed

- 1) Objectivity and association goals,
- 2) Ghost writing for association staff and officers,
- 3) Content review by association staff,
- 4) Content sources,

5) Online forums, and

6) Other association communicators.

Three representatives from ASBPE and three from SNAP drafted the language in late 2008.

Representatives from ASBPE were Jeanne LaBella, vice president of publications, American Public Power Association; Erin Pressley, editor in chief, the *NACS Magazine*, National Association of Convenience Stores; and Freedman.

Representatives from SNAP were Chris Durso, executive editor of *Convene*, Professional Convention Management Association; Apryl Motley, editorial director of *Community Banker*, American Bankers Association; and Amy Lestition, executive director of SNAP.

1) Reconciling association goals with journalism objectivity

One of the principal ways an association publication is unique within the journalism field is the primacy of its parent association's mission.

The publication exists to advance that mission, and it can best perform that function by developing a reputation for credibility and objectivity in the delivery of its content.

When it enjoys such a reputation, it exerts influence over its audience separate from the influence of its parent association.

Thus, it should be possible for an association publication to take an editorial position on issues that are consistent with the mission of its parent while still fostering trust among its audience groups by weighing all sides of issues and by including voices of opposition in its coverage.

2) Supplying content on behalf of association officers, staff, and members

Although it is not a recommended practice, it is not uncommon for editors to draft columns, editorials, blog posts, and other publication content on behalf of officers, staff, and members of the association.

Neither is it uncommon for editors to craft quotes for insertion into news and feature articles and other publication content on behalf of officers, staff, and members of the association.

It is appropriate for editors to use this ghost-written material as long as the content is validated by the person under whose name it has been written.

It is also a practice for editors to insert into publication content quotes and other material written by association staff on behalf of officers, members, and other association staff.

When editors use ghost-written quotes and passages from other association material, such as press releases, speeches, podcasts, videos, and presentations, they should provide appropriate attribution to the source material.

3) Editorial review of publication content by other association staff

Association staff are often experts in their field on issues of concern to the association. Because of that, it is not unreasonable for editors of association publications to seek expert review of editorial copy from their colleagues in other departments within the association and in for-profit and nonprofit subsidiaries.

Such review by association experts should be limited to questions of accuracy and should not include matters of tone and position on issues.

Editors should manage this technical review process and have the last word on what appears in the publication.

4) Sources of editorial content

It is not uncommon for association staff to enter into alliances or work on projects with other entities and public agencies.

In some cases, association staff offer editorial space in the association publication to the other entity or public agency as part of the alliance or project agreement.

It is also an accepted practice for associations to bundle together benefits of association membership into a package made available under an “associate,” “service,” or “affiliate” member category. In some cases, a bundled package of benefits includes making publication editorial space available to that class of member.

In any instance in which editorial space is offered to an outside entity or type of member, editors should have the final word on the inclusion of any such content in the publication.

5) Using material from online association member forums

Many associations maintain member forums, chat rooms, listservs, blogs, and other vehicles through which they seek to build active member communities online.

It is common practice for associations to provide a disclaimer informing users that the venues are public forums and that anything written in them is publicly available for use elsewhere, including association publications.

Editors using material from these venues should, as an upfront courtesy, inform the person who submitted the material and include appropriate attribution to the venue.

It is acceptable to maintain the anonymity of the person who

submitted the material if that is the preferred attribution.

6) Other association communicators

Thanks to innovation in technology, association staff other than editors have access to cost-efficient and user-friendly tools for producing e-mail and print newsletters, audio podcasts, Web video, and other communications media.

As the staff professionals whose editorial expertise represents their value-add to the association, editors should encourage non-editor communicators within the association to be sensitive to the kinds of issues of objectivity that concern editors.

Editors should thus encourage non-editor communicators to familiarize themselves with the ethical issues discussed in this code of ethics and the rationales behind the recommendations.

This update replaces the ASBPE “Guide To Preferred Editorial Practices,” June 2008 and May 2007. This guide is a complete rewriting of ASBPE’s “Code of Preferred Editorial Practices,” November 2000.

In preparing this guide, ASBPE studied the ethics statements of numerous journalism associations, business-to-business publishers, educators, and consultants, as well as the desires of the ASBPE membership.

ASBPE especially acknowledges the American Association for the Advancement of Science, American Business Media, American Society of Journalists and Authors, American Society of Magazine Editors, American Society of Newspaper Editors, Associated Press, Association of Health Care Journalists, IDG, *The New York Times*, Pennwell, Poynter Institute, Society of American Business Editors and Writers, Society of Professional Journalists, Society for Technical Communication, Paul Conley, Jeff Seglin, and David Shaw.

Approved unanimously by the 18 ASBPE board members in April 2006, the guide is available to anyone for download at www.asbpe.org.

Publications are welcome to adopt this guide or to use it along with the codes of other organizations.

Special thanks to the ASBPE Editorial Practices Committee:

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