

## Oral History Project – Partner Proofing Guidelines

### Story Review

- Stories from constituents will be available for review 48-72 hours after the initial call.
  - Stories appear in the Story Proofing Tool at the same time they are made available for constituents to review.
- Reviewing every story is not required, but PCI recommends reviewing stories from VIPs.
  - There is a search feature in the Story Proofing Tool that will isolate VIP stories for review.
  - We also encourage reviewing proper nouns (professor names, cities, buildings, etc). We utilize an AI-assisted transcription tool to write stories. While this tool is speedy, it is still a new technology and there may be errors.
- Story review should be completed by the end of the marketing phase so PCI can move forward with our final QC, layout, and proofs and stay on schedule for a timely book release.
- Stories not approved in the Story Proofing Tool will still appear in the publication.
- PCI editors do not review stories for context.

#### Exceptions:

- If a story is flagged as having objectionable content: PCI editors will review the story and remove any objectionable content. If necessary, they will go to the original story transcription to see if there is anything else that can be obtained to round out the story.
- If a story is provided on behalf of a deceased individual: PCI editors will review the story to ensure the story uses the third-person perspective (he, she, they, etc.) and to include a signal phrase denoting who called in on the deceased's behalf. (ex: My husband, Bill, attended Caltech in the 1960s.)

### Style Guides

We are unable to accommodate specific style guide requests from our partners. Our team reviews stories from dozens of different organizations each day and using one style guide promotes consistency, efficiency, and professionalism, resulting in a savings of both time and money. If there are specific guidelines each written story should follow, it is the responsibility of the partner to make those edits, as well as notify their project manager so our editors do not make style changes during our final review.

### Photo Review

PCI will review every photo after the marketing phase ends and will remove any that contain personal information, offensive content, or depictions of illegal activity. If there are other photos that should not be included (ex: photos with alcohol, weapons, hunting), please notify your project manager so we can remove those photos as well during our review.

All photos and captions printing in the publication are available for review via the Story Proofing Tool.

**PCI Final QC (after marketing is completed)**

- Spellcheck on stories, pull quotes, and captions
- 2,000 character limit on stories
- 100 character limit on captions
- Find & Replace
  - Project specific, using partner or PM-provided requests  
ex: change *Tido* to *Thibodaux*, change *John McIntire* to *Jon MacIntyre*
- Basic queries
  - Blank categories
  - Removal of: paragraph breaks (the story appears as a single block paragraph)
  - Removal of: Microsoft Word-specific characters, accents, double quote marks
  - Removal of: spaces before periods, commas
- Content-specific queries
  - Phrases denoting transcription of post-interview discussion such as “oral history,” “my story,” “publication,” “permission”
  - Phrases denoting possible objectionable content such as “hazing,” “drug,” “illegal”
  - Phrases denoting possible lead-in to controversial content such as “unfortunately,” “sadly,” “controversy,” “initiation”

**PDF Proof Review**

- **Single volume books:** Partners will receive the entire book, fully designed, for review and approval.
- **Multiple volume books:** Partners will receive all volumes of the publication for review and approval. The first section of the first volume will be fully designed as a representation of what the remainder of the book/s will look like. (To save our designers’ time, we need to ensure there are no changes to the design or the stories before we clean up the remainder of the books.) Once the design and stories are approved, the partner will receive the fully designed PDFs of all volumes for reference.

PDF proofs reflect all final edits to stories and is intended to focus on the design elements.

- We ask that any design requests are submitted at one time (ex: color changes, fonts, overall design).
- Any changes to the stories, captions, or categories must be done via the Story Proofing Tool; we are unable to accept word docs or edited PDFs.
- Once we complete the edits, additional changes may involve a fee per page (as well as impact the release date of the publication).
- Final PDF(s) will be sent upon completion of edits, prior to sending the pages to the printer.