

[Updated September 2020]

Some OS Design Strategy Basics:

The central question that guides the OS design process is *how can we make this book “more itself”?*—which is to say, how can we understand the associations, physical reactions, visual and pattern language, feel / heft, scale, and other aspects of the *object* we are making in relationship to the work we’re transforming from text to experience? We are in the process of making automated or subconscious aspects of the work tangible and intentional.

We have always involved OS authors/collaborators in thinking about this process. If you’re receiving these guidelines, you probably already know that each collaborator receives a “[Design Thinking / Proprioceptive Prompts](#)” document to help facilitate their engagement in the conversation even before the design process begins on our end. Once size and other decisions have been collaboratively made, the following are used as standard procedures / style guides.

If you haven’t yet reviewed that Design Thinking document, **please do so now**: determinations about not only visual / formal elements but also proprioceptive and experiential relationships with the book/object as a key to OS project design are explained here in a way that is essential to an embodied design process we intend all our projects to undergo.

It can feel challenging to bring other folks into the design process for projects still under the OS umbrella, and are committed to all our projects demonstrating the design thinking that has always been a marked quality folks notice about our projects, but at the same time we are committed to moving more solidly into a more actively anti-hierarchical, decentralized model, without too much top-down control.

Whether you’re an OS community member working on designing your own project, or you’ve been brought it as a collaborator, we hope this document will help imbue your process with the spirit and ethics we’ve brought to our projects to date!

If you’re designing a book for the first time, it’s worth noting that our distributor, Ingram, offers an “academy” through Ingram Spark, their self-publishing/indie press arm, with free [courses on book design](#).

Whether or not this is new to you, remember that paper weight and other printer specifications will affect the margins, spine width, and other spatial limits. There are guidelines for this within Ingram’s online resources—please use their [resource base](#) for publishing calculators and their file creation guide to help you figure out the specifications you’ll need to know.

Print Size / Dimensions:

Usually, printed project sizes will have been determined between the OS and author prior to layout, working through the Design Thinking doc, but this process is evolving and will often now involve collaborators. Please refer to the questions on the DT doc and be advised that we are limited to [the trim sizes available here](#).

Digital Extensions and Additional Options:

As of 2020, all OS projects are available via the [OS Open Access Library](#), which allows both for readers to directly support our community members directly at the level available to them, as well as providing critical access to individuals, communities, and organizations who might otherwise not have viable avenues and/or resources for purchasing or accessing our projects.

What this means for you as a designer is that when you're considering multimedia, live links, the inclusion of color, alternative dimensions beyond that of our print spec list, etc., that anything is really possible for the *digital* version of the book. A greyscale version for print will keep the print / retail cost low, for instance, with the possibility of unlimited color media either within the digital version or within digital extensions available online. Other media, of course, can also be explored and considered through this avenue, if you're interested in making it.

Fonts / Typography:

As the Design Thinking document states, typography is hugely important for the Operating System. Typefaces come with historical and political, as well as aesthetic and disciplinary associations and baggage (and some take less energy/ink to print!)

Many typefaces also have problematic political histories, and design, as a field, is historically weighted towards whiteness. A little digging can help you find not only libre / Open Source fonts made and shared ethically, but also created by BIPOC designers. Check out this article on "[How to Support Black Type Designers and Their Fonts](#)," and [this one specifically focusing on the work of Tré Seals at Vocal Type](#). A great resource for many reasons is [VTF / the Velvetyne Type Foundry](#), which you'll find in the first article. You'll find open source and free/libre typefaces there, and VTF was founded by the amazing Frank Adebaye. We also often use [dafont](#) for typography exploration and inspiration, as well, but ask that you do due diligence in checking out the designers before we use their work.

In general, we have created font families for each title, with title fonts for the interior following off titling on the cover, sometimes with alternative or additional fonts for author name(s), section titles, etc. Please see other OS titles (or the InDesign sample docs in the assets folder) for examples of how this usually works for our projects.

By and large, interior body font size has been 10, traditionally, but it differs based on readability

of the font and the density of the text. We are also committed to accessibility, and support large-print versions, either for print or made digitally available.

LAYOUT

Text Justification:

This is one area where the OS's house style is visibly and consistently distinct, and it's important to us that this continue, because these standards consider the body and user experience in ways that design often fails to consider.

For poetry / broken prose:

An OS house style sheet standard is that, usually, we MIRROR justification, and/or that we move text in relationship to the work's content / tone. You may have thought, upon seeing OS books, that authors submitted them this way but this is rarely the case: instead, we have worked with authors to bring in meaning around the positionality of the text on the page as a new part of the process of making the work.

When we mirror, we treat the left and right hand pages differently, left aligning on the left and right align on the right page on pretty much all our books (unless the work is explicitly concrete). But we'll also work with pulling certain text tight to the spine on BOTH pages, again mirrored but with the left page aligned R and the reverse on the right hand page.

Short poems might be centered top to bottom on the page, or low on the page to give a sort of "gravity." Both author/poet and designer are encouraged to work actively on these concrete elements of each page.

This is more important than you might think: as a designer working with making, thinking about the book *object* as a space for breaking down conditioning -- aligning with the book's edge on BOTH pages, left and right, gives the most breathing room from the spine around the text (unless that tightness is emotively productive / tonally suited). We always ask *why* and *how* our language-specific practice of writing L-R and then the tools we use to print or word-process directionally have affected our writing more than we ever intended or cognitively addressed.

For poetry lines that spill over, justify to the end of the line and spill onto the second line. **No tabbed in continued lines!** this isn't legible to the general public and reads like a pause in a concrete poetic reading, the opposite of the intention. And/or ask the author to create a new line-break (or discuss with editor on project.)

For prose / paragraph text:

All OS prose blocks should be **justified**, so that, again, the right and left hand pages have consistent margins, clean and matching, rather than left aligned for both. Center blocks on the

page vertically vs. staying aligned to a consistent top margin.

Titles:

Titles of individual pieces should be always flush left and flush right, mirrored, for both prose and poetry, unless concretely designed by the author / artist as appearing a specific way in relation to the work. There should always be at least $\frac{1}{2}$ " white space below before text begins. For poetry, always leave at least $\frac{1}{4}$ " from the outer margin of the title / page so that body is stepped in from the title. Section titles can be placed / sized at the discretion of the designer.

Titles should be, with some exception, in the typeface chosen for the cover typography, and/or in a different text treatment from the body. This can be reviewed after the full manuscript has been pasted up with placeholder fonts.

Page Numbers and Orientational Information:

Page numbers live on the y-axis along the edges of each page, at 60% grayscale. If a book has sections you may choose to keep the section title present alongside the page numbers like a file tab for navigation / searching. This asset is provided in the design templates.

Section Titles / Blank Pages:

A section title should always live on a right-hand page, followed by a blank, followed by text beginning on the right hand page. Blank pages before section titles are also fine if needed to retain this orientation. Two blank pages should always be kept at the very back of the book, as necessary for POD printing and to allow for notation.

Design Basics and Driving Concept for Translations:

we focus often on these books as *archival objects*, and don't assume the reader will necessarily only be using it as a linear reading experience, and as such we always prefer facing pages for reference, perceptive, scholarly and other purposes.

Even for the English reader, who may or may not have knowledge of a language of origin, it's important to be able to inhabit the look, feel, and sound (if legible / visible) of the origin text in its primary language as they move through the document. Which they are able to do only if, while reading the English, they can look to the facing page for that form.

We always honor and center the language of origin. Which means that all R-L translation publications should be R-L (cover with spine to the right) with a layout that presents English translations on the L with original text on the right. Ergo, L-R translations should have language of origin on the L with translation / English on the right.

Standard Front and Back Matter:

This list is provided so that you can leave blank pages for standard OS assets, which will change fairly regularly based on administrative and program evolution. You can request updated assets as your project nears completion, and/or provide IDML files for completion to our editorial / design in house volunteers.

The order used most frequently for front and back matter of OS books is also indicated, but there is some wiggle room for each project dependent on its specs (ie: inclusion of dedication, acknowledgements, introduction, glossary, etc.)

FRONT

- [quotes and/or reviews on opening page as requested]/R
- Title page - large, title and author/L
- Copyright Page
- Title page - title (no author), smaller/R
- Other optional front matter: dedication, acknowledgements, other work by, TOC

BACK

- section break or blank page after end of work
 - Q&A or Artist's Statement/Process Notes/Expository Notes
 - Bio/Photo (photo optional) of Author(s) and/or editor(s) and/or translator(s)
 - Bio/Photo of cover/collab artist and optional artist statement or notes on work used
- Optional: other ephemera, other notes/process/afterword, bibliography, works cited, acknowledgements, other work by, etc.
- Standard OS Backmatter:
- Why Print/Document?
 - List of Titles (varies in length/format)
 - About Glossarium/Kin(d) where applicable
 - DOC U MENT last page (must be L/back)
 - two blank pages at end

Extended Colophon / Production Instructions

Beginning in 2020, we will include "production instructions" in each project, with the understanding that speculative inquiry insists upon us reckoning with knowing very little about the future of print vs. digital, ownership, etc., for ecological and other reasons. We're interested in cataloging, for the archive, instructions for the production of print and other materials, included in all versions of the work, for potential future reproduction. We will work with you on producing this, using your answers to this document and other aspects of the project's design that emerge as we work on it together.

ASSETS:

An indd template with these assets lives [here](#), but will need constant updating.

The CCBYNCND image to use for the copyright page also lives there.
You will be supplied with the ISBN and LIC #.

COPYRIGHT PAGE:

the operating system print//document [←---in OCR Standard]

TITLE [←---in title font from cover]

ISBN: #####

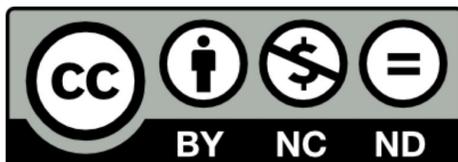
Library of Congress Control Number: #####

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Other staff on this project?←— add names if necessary]

Cover image / credit?



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