

society for editors and proofreaders

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upholding editorial excellence

Annual report 2016/17

Unlike previous SfEP annual reports, this report covers the activities of the SfEP council and the Society from 1 March 2016 to 28 February 2017, the period of the Society's financial year. It does not cover activity between 1 March 2017 and the publication of the report in August 2017 in preparation for the SfEP Annual General Meeting (AGM) in September.

Chair

Sabine Citron

As a growing organisation with relatively limited means but high ambitions, we have taken great strides this year.

Of course it is our office staff who make all of this possible: Helen Martin, office manager; Bridget Buckle, finance officer; Josie Davies and Shannon Humberstone, office administrators. Most members have benefited directly from their patient advice and support: on joining the Society, on renewing their membership, or when they upgrade, book a training course or cannot find the relevant information on our website. We continue to support the office team through happy days and more challenging times; this involves, for example, appraisals, recruitment, training and CPD, decisions on pay rises, pensions, the regular exchange of information, problem resolution and crisis survival (the staff have nerves of steel and the best sense of humour). We also rely heavily on the many SfEP members who contribute their time and expertise to help and nurture the Society and its members: local group coordinators and other local helpers; web content and social media teams; forum moderators; the many *Editing Matters* and SfEP blog contributors; our volunteer proofreaders; the Directory manager; the conference team and sponsorship coordinator; our trainers and mentors; the admissions panel; the Judith Butcher Award panel; the benefits coordinator; those who update the membership map, compile 'Rates for the Job', take on one-off tasks and promote the SfEP at external events or on social media; and let us not forget those who take the time to answer questions and give helpful advice on our forums. It is your SfEP and you make it what it is.

This year, we have taken several steps that enable the SfEP to offer more professional organisational support to its members, notably the appointment of a

professional company secretary, Jane Muir, of Derringtons Limited (just before last year's AGM), and an external financial adviser, Mark Robinson, of MJB Accountants Ltd (just after the AGM). We have benefited greatly from Jane's and Mark's expertise. It is good to have sound financial advice to back up our decisions, and the external financial adviser has been able to confirm that, while we need to keep up our two main income streams of membership subscriptions and training, our finances remain sound.

One central initiative this year has been putting in motion the process of becoming a chartered organisation, following much positive feedback from members when we shared this objective with them. Our newly appointed chartership adviser, Gerard M-F Hill, and I have had a string of meetings with government bodies and sister organisations, all very encouraging; it turns out we are further down the road to chartership than even we expected. Watch this space for good news.

You will find details of much other progress in the directors' reports that follow. As you know, last year we created two new directorial posts, external relations and standards, and we expanded the former regional development role, turning it into the community remit; we also replaced the publications role with the broader information remit. We are already wondering how we ever managed without these new or expanded remits.

Our membership numbers have continued to grow; members are taking their continued professional development (CPD) seriously and understand the benefits of upgrading their membership. This is at the core of what the new, chartered body will focus on – a clear statement that our organisation stands for high standards in editorial work and for editorial professionals. SfEP training courses have remained very popular; a new workshop on marking up PDFs has been added to our offer, as have online versions of 'Editing with Word', 'Medical editing' and the new copy-editing suite. Our mentoring scheme now benefits from sitting under the same remit as training. Last year in June, the SfEP held a very successful specialist CPD day for fiction editors. And of course the Aston conference was a resounding success, bringing together a large number of members, speakers and guests (including a representative of

the Department for Culture, Media and Sport) and recharging our collective batteries. We look forward to seeing many of you again at Wyboston Lakes.

While all of our remits involve a lot of daily behind-the-scenes work to keep the Society running successfully, some directors, such as the membership director, accomplish this while also managing to put into place many improvements in efficiency and processing that will be useful for years to come. The community director now looks after our local groups, our social media presence and our blog, all growing and all playing their role in making us feel like a team and in publicising the Society, its members and the professional standards we all represent. We have also become more systematic about raising our profile and advertising what we have to offer, internally and externally; among other tasks, the marketing director's role this year involved a new marketing plan, the active involvement of a team of volunteers and a new set of advertising materials. For the first time, we were also offered a free stall at the London Book Fair in March 2016 – saving us an expense of £5,000. For our mailings to members, we are now making increasing use of an email marketing tool, saving a lot of office time.

You will see below that, under the watchful eye of the internet director, our website usage figures are continuing to rise, and our member forums are now seen as one of the core benefits of membership, providing as they do support, advice and sharing of information. I would urge all our members to try them. Meanwhile members can now update their own Directory entries and Directory usage is increasing, in terms both of the number of members with an entry (78 per cent of Professional/Advanced Professional Members at 28 February 2017) and, importantly, of the number of clients consulting the Directory when they are looking to place a job. Our more traditional media continue to do well under the wing of the information director, who oversees *Editing Matters* and the SfEP Guides; the Guides sell well, both in PDF and hard copy, and the latest addition, *Going Solo* (about editing as a business), has proved a hit from the start, requiring a second print run.

In May 2016 we created the new standards remit, with responsibility for standards, tests and complaints. Some of the standards director's time this year was taken up with investigating and assessing two

complaints against members; this is an unavoidable part of being a Society that sets itself and its members high standards. More and more members are taking the basic editorial test as part of their upgrade, with a 52 per cent pass rate first time round and 69 per cent for resits; we are developing advanced tests: watch this space. The other new remit is that of external relations, to help us reach out to universities, publishers, sister organisations and other professional bodies and strengthen ties with them. This will be a sizeable task, but we are starting to lay the foundations and have created the role of SfEP ambassadors to represent the Society in the outside world.

Here's to tomorrow's SfEP!

Chartership

Gerard M-F Hill, chartership adviser

Sabine Citron and I began regular meetings with the Privy Council Office (PCO), who handle applications for royal charters, and with the Department for Culture, Media and Sport (DCMS), who agreed to sponsor our petition. A representative of DCMS, Tracey Heyworth (senior policy adviser, creative economy), attended the 2016 SfEP conference. We also met representatives of other relevant bodies: Creative Skillset, the Publishing Training Centre, the Society of Indexers, the Institute of Linguists, the Institute of Translation and Interpreting, the National Union of Journalists and the Foundation for Science and Technology (FST), of which the SfEP is now a member. We are receiving expert advice from the learned societies' liaison officer of the FST. All these meetings were positive in tone and brought useful information and contacts.

We already have many of the prerequisites for chartership: a unique profession, no significant overlap with other bodies, relevant bodies having been consulted, full members qualified to degree level, financial soundness, a record of achievement, international links, an educational role, a ministry sponsor. It seems there is some flexibility in the requirements in terms of membership numbers. We must also show that we have suitable admission requirements, with provision for training and tests; that a charter for the SfEP would be in the public

interest; that we inform and educate the public; and that we engage regularly with Parliament, government and publishers. The feedback we have had from the PCO and FST is that we are well on the way.

Following a review of progress and of our chartership strategy, we plan to allocate priorities in the next stage and identify the tasks that need most input. Progress will be reported in *Editing Matters*.

Community

Sue Browning

Nowhere is the unique spirit of the SfEP more apparent than in the community remit, a role created at the AGM in September 2016 and encompassing the local groups (formerly regional development), our social media presence and our blog. None of our activities in these areas would be possible without our dedicated band of volunteers, including our fourteen-strong social media team, Tracey Roberts on the blog, and more than 50 coordinators who keep our local groups lively and interesting, not to mention the support behind the scenes from the web content team, as well as the five forum moderators. Thank you to you all. The SfEP would not be the welcoming and supportive community it is without you.

Local groups

Our local groups play a key role in supporting new (and not so new!) members, and the fact that non-members can attend up to three meetings to see if editing and the SfEP are right for them is also attracting new members to the SfEP.

At February 2017 there were 39 local groups, as well as a Skype Club and SfEPInternational. January 2017 saw the birth of a new group, Hertfordshire/Essex, and the Bedfordshire group has been renamed the Bedfordshire/Buckinghamshire group to better reflect its geographic coverage. Two groups have closed down during the period: the Peak District (due to lack of members – thank you to Pat Winfield for keeping the group going for many years) and the Bournemouth group (now included in Wessex).

During 2016/17, six local coordinators (LGCs) stood down, and five have taken their place (the numbers aren't the same because some groups have more than one coordinator). Thank you to all those who have

played their part and also to all those stepping up to keep our local groups thriving.

This year we have seen a number of activities to promote local groups as an important membership benefit, with articles in *Editing Matters* and a number of blog posts. The use of local pages on the SfEP website continues to expand, with LGCs using the space to post photos of group activities to attract and enthuse members. Thanks as ever to Gordon Hooper of the web content team, who maintains these pages and the calendar of events.

Meeting places range from hotels, cafes and pubs to village halls and community centres, and activities have included a visit to the Bodleian in Oxford, a stroll among the snowdrops in Gloucestershire, netwalking, bring-and-share meals, attending events at the Cheltenham Literature Festival, and a visit to the archives at BBC Scotland. Wherever local groups meet, and whatever they do, food and drink are often involved, and there is always an opportunity to share experiences with like-minded people.

Many groups have found that their most popular meetings involve an element of training or CPD, as these attract members from further afield and also provide an opportunity for neighbouring groups to get together. In February 2017 I issued some guidelines for groups arranging local training, explaining the new policy on this as developed by the training director.

One of the highlights of the year will surely be the Scottish mini-conference to be held in Edinburgh in May. It is being organised by Lesley Ellen of the Edinburgh group, with support from the other Scottish group coordinators. Even before booking had opened it had attracted much interest, with one speaker even coming from the USA to take part in a varied and interesting programme.

Local group coordinators had a meet-up at the 2016 conference – a chance to share experiences and raise discussion points. One of these, access to up-to-date membership lists for LGCs, has now been implemented. We intend to run a similar event at the 2017 conference.

The Skype club continues to go from strength to strength, connecting and supporting members who live overseas or in far-flung places of the UK or for whom attendance at a local group meeting is

impossible. It now meets every month at times to suit its widely dispersed membership.

SfEPInternational is our forum dedicated to our international members. At February 2017 there were 213 international members (up from 192 in June 2016), with members living in 42 countries, and from Argentina to Zimbabwe. The countries outside the UK with the greatest number of members are Ireland (25), Australia (17), France (17), USA (14), Spain (13) and New Zealand (13).

Social media

Our presence on Twitter and Facebook continues to grow and reach beyond our membership, thanks to our dedicated social media team, and we've also added LinkedIn and Google+ to our platforms. As well as posting interesting links to online content, we have run a number of targeted campaigns publicising the conference and promoting our seminar and competition at the London Book Fair and the Judith Butcher Award, for instance, as well as regular posts drawing attention to our training courses, SfEP Guides, blog posts and other resources.

Between June 2016 and February 2017 the social media team dealt with more than 30 queries concerning subjects such as membership options, local groups, and various fine points of grammar and spelling. We also talked with SENSE (editors' society in the Netherlands) about how we run our social media activities. These activities raise the SfEP's profile and keep us engaged with other editorial professionals across the world and also allow us to connect with those who might use our services, so they are a vital part of operating in the modern world.

Blog

Our blog is coordinated by volunteer Tracey Roberts, who plans, seeks contributions, and schedules all our posts. Since March 2016 we have published 31 posts on subjects as diverse as editing romance and chemistry (not at the same time!), on technical subjects such as Windows options for Mac users, on business practices, and on the joys of volunteering for the SfEP, members' favourite childhood books, and taking guilt-free time off over the holidays. Our 'Conference preview' posts helped attendees choose their sessions, and our 'Introverts at conference' post was particularly popular.

Perhaps the most exciting news was that we reached the finals of the UK Blog Awards. The results will be announced at a glitzy ceremony in London in April. This will be great exposure for the SfEP, so congratulations to all our contributors who made this success possible, and thanks to all who voted for us!

Conference

Beth Hamer

The 27th SfEP annual conference was held at Aston University, Birmingham, on 10–12 September 2016. It attracted 145 delegates and was very well received, with delegates rating it 'very good' overall (average score of 4.9 out of 5). Delegates scored the balance and variety highly (4.8 out of 5), and any complaints mostly related to some issues with broadband access and the disappointing quality of the coffee in the refreshment area. All comments were noted and will be addressed as far as possible. A surplus of £4,628 will be put towards the 2017 conference.

The previous conference director conducted the search for the 2018 conference venue, and the council voted to hold it at Lancaster University on 8–10 September 2018.

Preparations for the 2017 conference began in earnest in November 2016, with a meeting attended by SfEP office manager Helen Martin and conference team members Helen White and Peter Norrington. As this is my first year as conference director, I decided to use tried and tested formats for sessions rather than try to innovate at this stage. We tried to create a programme that catered for a range of interests and levels of experience, and we hope that everyone finds something to inform or entertain them in each session.

We decided to keep the approach to sponsorship that was tried in 2016, offering free exhibition stands and discounted sponsorship packages, and made our main aim an exhibitors' fair worthy of the name. This might lead/contribute to the conference making a small loss, but a better exhibitors' fair should enhance delegates' conference experience and help the SfEP build relationships with interested parties. Sherona Treen-Coward, reprising her role as sponsorship coordinator this year, has built on the good start that was made last year.

As last year, we offered 10 per cent discounts to eight sister organisations (American Copy Editors Society, Editors' Association of Canada, European Association of Science Editors, Institute of Professional Editors, Mediterranean Editors and Translators, Northwest Independent Editors Guild, Professional Editors' Guild, Unión de Correctores). Most have offered reciprocal discounts to our members for their conferences and other events. We have added the International Society for Managing and Technical Editors to this list for 2017.

Since the start of the new financial year (2017/18), plans for the Wyboston Lakes conference have continued. At the time of writing, we have taken 125 early-bird bookings – a record number.

As detailed in the 2016 annual report, the 2018 conference will be held at the same location and at the same time as the Society of Indexers conference (Lancaster University, 8–10 September 2018), but it won't formally be a joint conference. There will be some joint events, but at this stage plans are still being developed. At the request of some members, we are looking at the possibility of opening conference booking slightly later to distance it from the membership renewals season, although the timing of the conference in September and the cancellation clauses in our contracts with the venues mean our flexibility is limited.

Because Aston University was such a popular venue for the 2016 conference, I proposed to the council that we return there in 2019. This was also to allow me more time in my first year as conference director to plan the 2017 event, rather than spend time on a venue search. The council voted in favour of this proposal, and I am currently in discussions with Aston about dates and fees.

External relations

Ayesha Chari

The external relations (ER) post was created in September 2016 to raise the Society's profile, its standards and its membership numbers. The postholder was to aim to establish and nurture ties with universities, publishers, sister organisations and other professional bodies.

Writing the inaugural annual report of a spanking new remit is never easy, as time flies by in defining tasks, unlearning, learning and relearning. Mostly, finding one's feet. So, where have I got in six months and a bit?

I began with plenty of homework on organisations the SfEP has had ties with over the years, some that went different ways, but many more that continue to thrive and support us as I write. While there was already a vast contact list of collaborators and an even larger set of initiatives taken by the Society, I realised we needed an organised system for building these relationships and activities. So, I put together an ER plan of action to prioritise increasing awareness about the SfEP and editorial standards, by initiating conversations with publishers, universities, international editorial organisations and internal communications staff/departments with a view to long-term collaboration. For raising awareness, the plan proposed to build an evolving list of events and seek avenues for SfEP participation with the help of the marketing and PR (MPR) director.

In November 2016, I set up and ran the SfEP stand at the Society of Young Publishers (SYP) conference. This was an exciting first ER experience that made me aware of how best to implement aims: ER initiatives will use local group resources and the 'ambassador' scheme in order to give members the chance to participate in the Society's chartership voyage.

So far, I have made contact with all 20 UK universities offering publishing or publishing-related courses, including Anglia Ruskin; City, University of London; Derby; Edinburgh Napier; Oxford Brookes; Plymouth; and University College London. Initial communication with programme coordinators, lecturers and professors has been positive, with enthusiasm for information leaflets, guest lecture sessions, SfEP input on training courses and even connecting with local groups. The increased number of student enquiries at the SYP conference and the London Book Fair (LBF; see more in the MPR report) is evidence of slowly growing awareness. Correspondence with the universities is under way and I hope will establish lasting bonds with academic partners of the SfEP.

In this time, I have also been in touch with international organisations to establish new contacts or take forward existing connections. Ideas for developing long-term inter-society opportunities have been exchanged with the Society of English-Native-

Speaking Editors (Netherlands), Mediterranean Editors and Translators (Spain), the Editors' Association of Canada, the International Society for Managing and Technical Editors (USA) and the National Arts Council (Singapore). Communication is in progress, and initiatives will be reciprocal and include contributions to Society publications, blogs and newsletters; training, conference and/or membership offers; exchanges of conference and event speakers; and CPD opportunities. We are also seeking platforms for mutual promotion and collaboration including via local group activities.

I've made little headway with contacting publishers and in-house staff, as much groundwork – in the form of a code of practice for Corporate Subscribers and perhaps a re-examined benefits package – still remains. The chartership adviser has shared a wealth of knowledge in this respect and we will be working together in this area over the next year. Although this particular lack of progress has left me with a sense of inadequate accomplishment, to end on this note would leave you with a false impression.

Building relationships is often intangible, and thus difficult to measure or express. It also isn't possible without support, which I've had in plenty not only from the council but from members who've come forward with contact leads at potential sister organisations, shared feedback on events or conferences attended, given ideas for new alliances and volunteered to 'do anything to help'. The ER remit would not go far without this, so thank you for helping set sail. I look forward to extending our collective efforts in the year ahead.

Finance

Mark Robinson, external financial adviser

My company, MJB Accountants Limited, took on the role of external financial adviser, a new post for the SfEP, just after last year's AGM. Bridget Buckle, finance officer, continues in her role, as do Warrener Stewart, chartered accountants, who have once again prepared the annual accounts to be presented at this year's AGM.

I am pleased to report that the figures for the year ending 28 February 2017 show a healthy result. The surplus for the year was £65,061. This is up from a surplus of £43,492 last year.

This year has seen income to the Society increase by 7.4 per cent, from £467,746 last year to £502,270. Income from membership subscriptions rose by £22,483. More detail on membership can be found in the membership director's report. Income from training has also continued to increase, to £162,912 this year, which represents 32.4 per cent of total money received. The surplus on training rose to £110,442 (up from £91,230 in 2015/16). Further details are provided in the training director's report.

Directors' fees have reduced from £73,372 last year to £65,278 this year. This is due both to careful management and to the fact that in some cases directors could not give as many hours as intended to the Society. The first 15 hours of each month for each director continue to be unpaid, as do 7 hours per council meeting.

Administrative expenses appear to be in control and rose by only £4,558 in the year. This too is the result of careful management of resources. However this year's surplus is also attributable to the fact that in certain projects there was work to be done that was budgeted for but that has not yet been completed. The directors decided that a focused marketing effort is required in order to increase our membership and make the Society better known in the outside world, to the benefit of all members, and this marketing effort requires further development. Moreover, the Society's database is currently independent of our website; the council has begun (but not yet completed) a long-planned project to streamline and improve links between the two (for example, to ensure that members renewing are charged the right subscription for the grade they hold). Finally, the Society's chartership application is likely to require considerable input in 2017/18. All will require significant investment, well beyond the surplus amounts carried forward from 2016/17.

Figure 1 is a pie chart showing the proportions of money that were allocated to various types of expenditure in 2016/17. This is the visual equivalent of 'What your subscription pays for', which in past years was presented in tabular form. The figures on which the chart is based may be seen in the Society's accounts ('Report and financial statements').

I am looking forward to the year ahead, continuing to support the finance officer and the office, and working

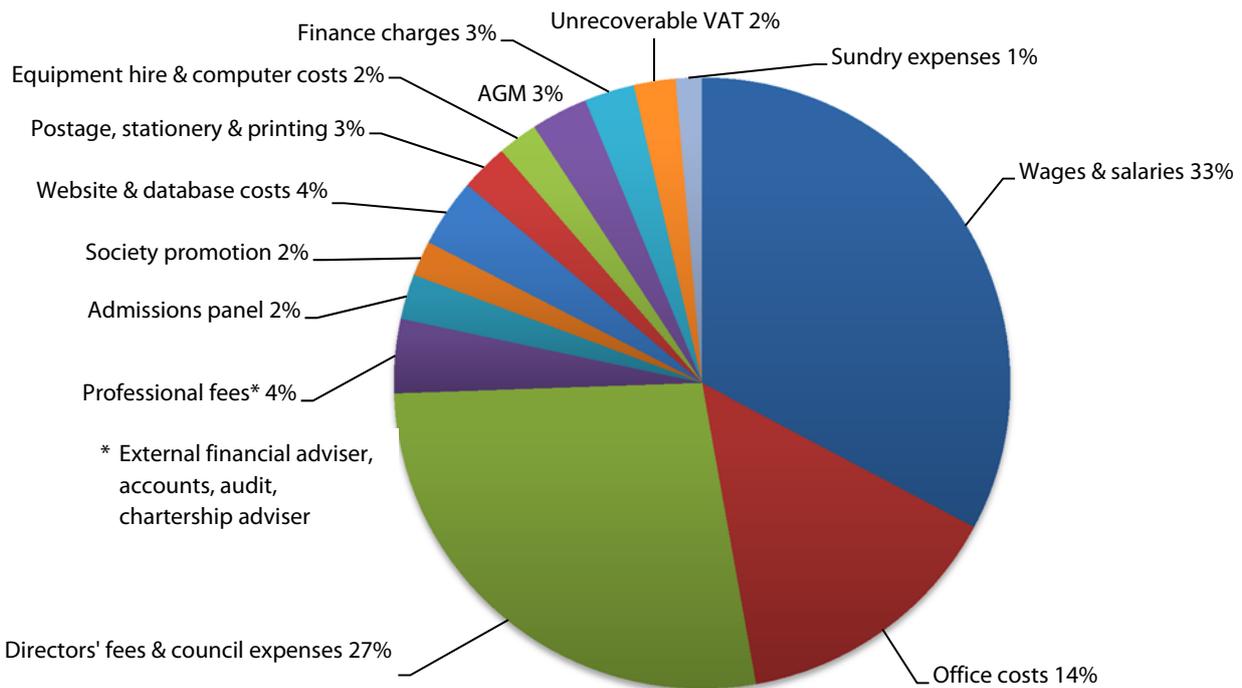


Figure 1 Proportion of money allocated by type of expenditure in 2016/17

with the council to broaden their understanding of the finances of the Society. This will include regularly reviewing budget allocations and other work as necessary.

The Society is in a healthy financial state at present, which stands it in a strong position as it continues to grow and develop and meet the needs of its membership and the industry.

Information

Steve Hammatt

We were pleased to publish a brand-new, fully up-to-date SfEP Guide for those starting up an editing/proofreading business: *Going Solo*, by Sue Littleford. The initial print run sold out rather quickly, so it was gratifying to have to commission a second print run. Although PDF sales of all the Guides are doing well, hard-copy sales remain strong, and reprints were done for *Pricing a Project*, *Marketing Yourself*, *Editor and Client* and *Theses and Dissertations*.

The *Editing Matters* electronic magazine is another important part of the information remit, and Hazel

Reid and her team continue to do a great job of publishing an interesting collection of articles every two months. Contributions for articles are always welcome, and remember that there is a searchable online index for *Editing Matters* on the website, which can be invaluable for finding past topics.

This year we held an *Editing Matters* team meeting, the first for a few years. Many interesting ideas were put forward, and by the time you read this you may well have seen the beginnings of a significant revamp of the magazine, aiming to make it even more appealing to our members.

Thanks to Mary Hobbins, the list of recommended books on the website was completely overhauled. We aim to make this a useful resource, not just for newcomers but for established editors too.

For the first time, we used our email marketing tool, Campaign Monitor, to help with the sending out of mailings for conference. This reduced a lot of the manual copying and pasting work that the office staff used to carry out, and speeded up the whole process. The same tool was used to help with membership renewals, this year using a more automated approach compared with last year, which again helped the efficiency of the task.

We also brought back some ‘lost’ amendments to the Society’s memorandum of association. These were a few changes voted in at past AGMs which somehow went missing at the time that later amendments were made. We are very grateful for the help of Naomi Laredo for bringing this to our attention and for helping us to put things right.

Other tasks along the way have included helping to ensure that the office PCs are backed up correctly, keeping the membership welcome packs up to date, assisting with SfEP Announce emailings, setting up the online voting for the extraordinary general meeting on training discounts, and publishing an internal style guide.

Finally, we have kicked off a long-needed review of our statutes, specifically the memorandum and articles of association, along with the Society’s by-laws. Their piecemeal revision over time has been necessary, but until now we have had neither time nor resources to take a wider view of the consistency of these documents and whether we have any significant gaps or other issues. Melanie Thompson has very kindly agreed to help out with this process.

Internet

John Espirian

Website success

The SfEP website continues to receive more unique visitors and total visits than ever before, and has for

the first time broken through a million page views. More than a fifth of all site visits have been made on a mobile, with desktop traffic accounting for just over 70 per cent of all visits.

Website statistics

The reporting period for this annual report differs from those of previous years. Therefore, I will now start using website statistics for the following new period: 1 March to the following 28 February (29 February in leap years). This period applies to all of the rows in Tables 1–4.

SfEP forums

Our members-only forum continues to cement its place as one of the key benefits of SfEP membership. In keeping with the pattern of previous years, the number of active users has increased, as has the number of members making the significant contribution of posting at least 50 times.

Since the middle of June 2016, the forum has received 20,624 posts – that’s about 77 posts per day.

The SfEP forums usage figures in Table 5 were collected on 6 March 2017.

Directory

Nancy Duin, Directory manager

Last year, I noted that there had been a ‘great leap forward’ in the number of directory entries – an increase of 99. This trend continued in 2016/17, with a

Table 1 Website visitor figures

| Period | Total visits | Unique visitors | Page views: unique | Page views: total | Page views: per visit |
|---------|--------------|-----------------|--------------------|-------------------|-----------------------|
| 2010/11 | 45,795 | 27,292 | 128,232 | 166,565 | 3.64 |
| 2011/12 | 184,639 | 106,204 | 480,327 | 611,164 | 3.31 |
| 2012/13 | 205,455 | 119,458 | 564,168 | 733,059 | 3.57 |
| 2013/14 | 272,130 | 157,267 | 714,229 | 913,881 | 3.36 |
| 2014/15 | 299,004 | 178,736 | 761,059 | 964,924 | 3.23 |
| 2015/16 | 279,656 | 165,802 | 776,303 | 995,417 | 3.56 |
| 2016/17 | 340,120 | 182,892 | 880,998 | 1,115,369 | 3.67 |

Table 2 Website visitors by hardware platform

| Period | Desktop (%) | Mobile (%) | Tablet (%) |
|---------|-------------|------------|------------|
| 2010/11 | 98.0 | 2.0 | 0.0 |
| 2011/12 | 96.1 | 3.3 | 0.6 |
| 2012/13 | 90.7 | 4.9 | 4.4 |
| 2013/14 | 83.4 | 8.5 | 8.1 |
| 2014/15 | 77.7 | 11.9 | 10.4 |
| 2015/16 | 74.6 | 15.4 | 10.0 |
| 2016/17 | 70.8 | 20.8 | 8.4 |

Table 3 Website visitors by browser

| Period | Chrome (%) | Safari (%) | Firefox (%) | IE/Edge (%) | Opera (%) |
|---------|------------|------------|-------------|-------------|-----------|
| 2010/11 | 10.7 | 16.2 | 31.9 | 38.6 | 1.9 |
| 2011/12 | 15.4 | 19.3 | 28.9 | 33.5 | 1.4 |
| 2012/13 | 22.7 | 22.4 | 24.0 | 26.6 | 0.9 |
| 2013/14 | 30.0 | 23.7 | 19.2 | 21.1 | 0.9 |
| 2014/15 | 37.3 | 22.7 | 18.1 | 16.6 | 0.7 |
| 2015/16 | 41.9 | 23.7 | 16.3 | 13.1 | 0.7 |
| 2016/17 | 47.3 | 23.9 | 13.5 | 11.0 | 0.7 |

Table 4 Website visitors by country, 1 March 2016 to 28 February 2017

| Position | Country | Total visits | Total visits (%) |
|----------|----------------|--------------|------------------|
| 1 | United Kingdom | 197,155 | 64.8 |
| 2 | United States | 25,290 | 8.3 |
| 3 | India | 10,798 | 3.6 |
| 4 | Russia | 5,559 | 1.8 |
| 5 | Australia | 5,287 | 1.7 |
| 6 | Philippines | 4,615 | 1.5 |
| 7 | Canada | 4,459 | 1.5 |
| 8 | Ireland | 3,911 | 1.3 |
| 9 | Germany | 3,165 | 1.0 |
| 10 | Spain | 2,697 | 0.9 |

Table 5 Forum usage

| | |
|----------------------------------|---------|
| Total topics/threads | 14,112 |
| Total posts | 122,507 |
| Total users | 1,804 |
| Active users* | 579 |
| No. users with at least 1 post | 952 |
| No. users with at least 50 posts | 231 |

* Active users are defined as those who have logged in to SfEP forums at least once in the last 30 days.

further 84 Professional Members and Advanced Professional Members taking entries, to give us a total of 667.

Between 1 March 2016 and 28 February 2017, the Directory was viewed 31,159 times – that’s about 85 times a day.

We’ve had a ‘great leap forward’ of another type during this period: the ability of entrants to update their entries themselves. This [video](#) by the internet director gives all the information you need to be able to do this. But if you’d like us to continue updating your entry for you, that’s fine, too.

Marketing and public relations

Margaret Hunter

The MPR director is responsible for raising the profile of the SfEP and publicising what we have to offer. This means helping our own members to discover all our valuable benefits, but also reaching out to potential new members as well as to those who use our members’ services. This involves promoting via social media, press releases, blog and news articles, publicity materials, advertising and sponsorship.

I have started work on a **marketing plan** to build on our current good initiatives and develop new ones. This will become increasingly important throughout our drive towards chartership.

The MPR director cannot do this alone, and I am grateful to **members who have contributed** their time and efforts to help. Particular thanks to Cath Harris, who has helped write external publicity, and to

our fabulous social media team, who all just get on with doing what they do, brilliantly. If you can turn your hand to writing publicity blurb, devising leaflets, or coming up with great social media posts (or anything else), do volunteer to help. It’s great CPD and I guarantee you’ll be appreciated!

We promoted our newest Guide, *Going Solo*, and launched six new and revamped **courses** during the year. We have developed a multipronged approach to **publicity**, including press releases, targeted external emails, internal emails, and a set of social media posts that go out regularly to promote different aspects of our offering. Our **competition** to win a place on the PDF course was popular! (This is a good publicity tool we have continued in the current year with our proofreading suite competition.)

We took out an **advert** in the 2017 edition of the *Writers’ & Artists’ Yearbook*. We have long had a mention in *WAYB* but the new featured ad looks to be producing good results. Gerard Hill and I also revised and updated the ‘Editing your work’ section in *WAYB*, which again is getting our name noticed.

We **exhibited** at the conference of the Society of Young Publishers and **sponsored** the Oxfordshire Publishing Group summer conference, sending leaflets about the SfEP.

Just a reminder that we have a series of **leaflets** publicising the SfEP – the Directory, training courses, membership, SfEP Guides etc. If you are attending an event where it would be appropriate to promote the SfEP, you can order copies of leaflets [here](#). We also have two **banners**, one aimed at potential members and the other promoting the Directory, which are available to borrow for outside events. I have also produced some A3 **posters**, e.g. the history of the SfEP, what’s where on the website, and testimonials about our forums.

We were very pleased to again be offered a free stand at the **London Book Fair** (LBF). As a non-profit body we could not afford the fee for this facility (about £5,000), so the generosity of the LBF is of immense value to us. The Fair was a month earlier this year in March, so just beyond the end of this report period, but I was busy beforehand updating leaflets, recruiting volunteers, preparing the proofreading test and competition, and generally getting ready. The LBF is a great opportunity to show people our Directory and to promote our training courses.

As an extra bonus this year we were successful in our bid to run a **seminar** at the LBF, 'Editing matters: doesn't it?', during which Ian Howe talked about what proofreading and editing are (and what they are not), and we played 'Spot the typo' and 'Is that what you really mean?', which were enjoyed by a packed room of publishing students, editorial professionals, literary agents and others.

Responsibility for our **social media** team passed to our community director halfway through the financial year, but MPR continues to contribute posts aimed at publicising our core offering, e.g. to promote our training courses. We successfully recruited a **blog** coordinator, Tracey Roberts, who has taken to the task with relish and has made a big difference to the content and regularity of posts.

Membership

John Firth

It is exciting to be able to report that four trends are continuing or improving.

- *Continuing*: large numbers are joining the SfEP each year – as of 28 February we had 2,468 individual members (including 14 Friends and 21 Retired Members) and 38 Corporate Subscribers.
- *Continuing*: a significant proportion are applying to join at grades above Entry-Level – 80 new members successfully applied to join as Intermediate, Professional or Advanced Professional Members.
- *Improving*: the success rate among these applicants is higher.
- *Continuing*: our 'mix' of grades continues to change, as substantial numbers of current members have applied to upgrade – this helps the SfEP speak with authority, since upgrade applications tell us what skills and knowledge our higher grades have, and the majority of our members now hold higher grades. It is hard to represent members effectively if we know little or nothing about them.

Detailed analysis of upgrade applications is provided in the professional development report.

In 2016/17 'renewals' continued to come in until near Christmas, and a few who did not renew at March 2016 have done so at March 2017. I can say, therefore,

that the lapse rate remained high (although down from 2015/16), but I cannot say with certainty what it was. A contributory factor is the number of members who apparently did not receive invoices or follow-up emails. There is considerable variation between ISPs in how they decide what might be 'spam' and how they then treat it, so it is difficult to establish the scale of the problem and come up with solutions (we are clearly going to need more than one).

Taking all this into account, our membership has returned to the level it was at renewal 2014. However, we are failing to retain Entry-Level Members (more than 40 per cent did not renew in March) and the Friend grade has failed to develop as we hoped. A proposal to change the basis for Friendship is being prepared for the 2017 AGM.

The graph in Figure 2 illustrates the interaction of the points made above (the line shows the average membership across the year, weighted by the number of months of membership).

At the 2016 AGM, final proposals for career-break membership were accepted, and the scheme has been introduced from 1 March 2017, with a review to be carried out in 2019.

The Judith Butcher Award for 2016 was given to Anne Waddingham. Anne has been a member of the SfEP almost since its inception. With David MacDonald, she developed and ran the successful onscreen editing courses that helped many SfEP members get to grips with editing in a new medium. Her humour and patience encouraged many to adjust to an unfamiliar way of working. Anne has also delivered many workshops and talks at conferences, and regularly shared her knowledge through the column 'Word Wrinkles' in *Editing Matters*. Her work over the last 20 years has done much to shape the discipline of 'onscreen editing' as we now know it.

As usual, in May and November 2016 we carried out surveys of members who had decided not to renew, and of the whole membership. The results of the membership survey in particular directly challenge several widely held beliefs about the profession (that editors need to specialise, that editors only or mainly work on books, that editors only or mainly work for publishing companies, that most have 'come up through' publishing). As some publishers seem locked in a 'race to the bottom' it is excellent to have broad-based evidence to show them that editors do not

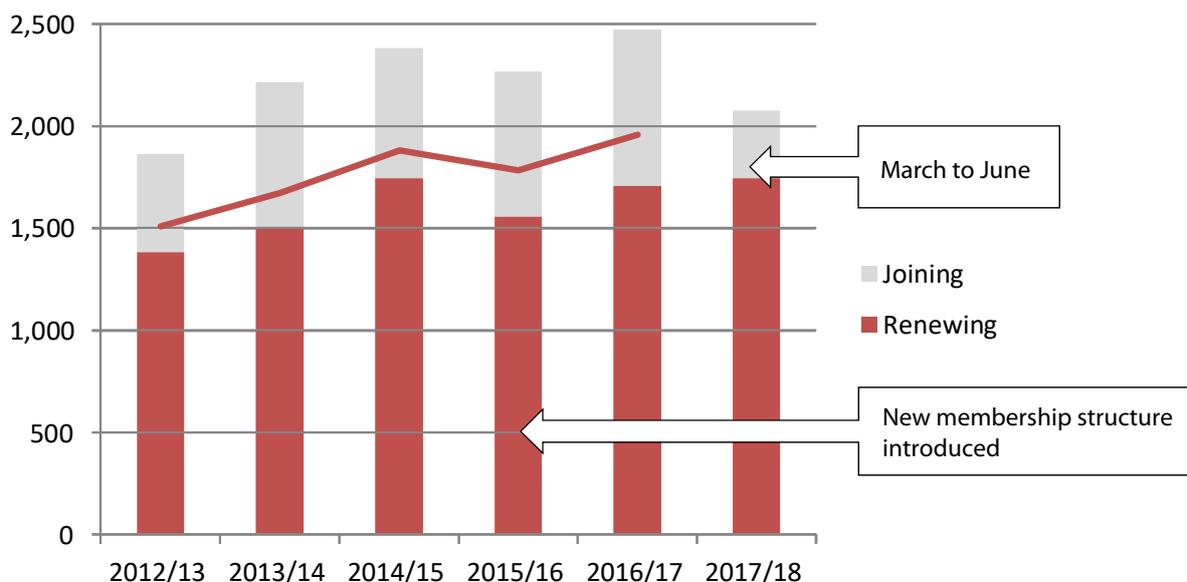


Figure 2 Trends in SfEP membership

need to accept poor briefs and uneconomic terms. The council is grateful to everyone who took the time to respond to these surveys.

After a year in post, our benefits coordinator, Lydia Wanstall, has organised our benefit provision, has consulted with members on what they would like to see and is moving forward to develop what the Society provides to its members. The SfEP will never be able to offer what large associations enjoying compulsory membership and government/employer subsidy can provide, but several benefits have been added during 2016/17 and we expect this to continue.

Professional development

Jane Moody

In the year from March 2016 to end February 2017 the admissions panel dealt with 223 upgrade applications from a total of 226 received (Figure 3): 117 (52 per cent) applied for Intermediate Membership, 75 (34 per cent) for Professional Membership and 32 (14 per cent) for Advanced Professional Membership. Of the other three, one applicant received Professional Membership automatically with accreditation from a sister society, one withdrew the application and one is the subject of an appeal against grading, which is in progress.

The total figures are lower than the figures for the preceding 12 months but that year was anomalous, as

the grading changes that had been introduced meant that more people needed to submit upgrade applications than under normal circumstances. Of the applications processed in this reporting year, only 9 applicants (4 per cent) were completely unsuccessful, so remained at the same grade; 108 were graded Intermediate (48 per cent), 69 were graded Professional (31 per cent) and 38 Advanced Professional (17 per cent).

The admissions panel currently has ten members, who continue to work hard behind the scenes to ensure that all applications are dealt with fairly and efficiently. One panel member resigned during the year. The council greatly appreciates the work that every member of the panel puts into making sure that every application is dealt with fairly and rapidly. The thought and care that goes into each application is a testament to the high standards of the panel. All upgrade applications are assessed anonymously; the panel assessors never know the identities of the applicants. If a panel member thinks that they might have guessed the identity of the applicant, they pass it back to the office for reallocation and take no further part in assessing that particular application. Most applications are handled speedily – often within a few days; the overall average time taken is 14 days. Occasionally, applications take a longer than the norm. The reason is most often the time taken by referees to respond to our requests.

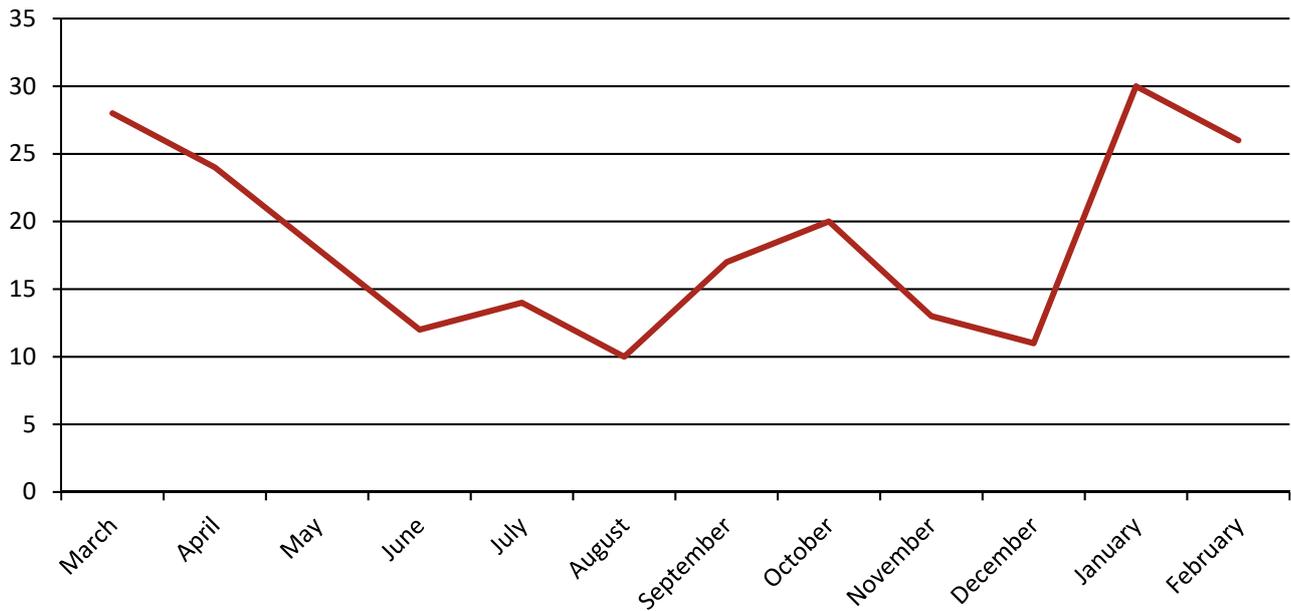


Figure 3 Upgrade applications 2016/17, by month

Continuing professional development is essential throughout a copy-editor's or proofreader's professional life. An event for fiction editors was held in London in June 2016, which was attended by 68 people and was well received. Andrew Wille, book doctor and editor, looked at the different functions that an editor's role can encompass: developmental editing, structural editing, copy-editing and proofreading, as well as related tasks such as fact checking, clearing permissions and design. He also described how some writers are seeking other types of help, with the editor acting as a coach or a teacher. Various practical and ethical aspects of working with writers and publishers were discussed, including how we can best serve their intentions in publishing and how we decide what we can or cannot do to make the best book possible.

Emma Darwin, writer, lecturer in creative writing and editor, looked at the craft of writing, what things most often prevent a book from working as well as it could, how to spot them and what to do about them, while respecting the writer's voice and vision. She looked at the decisions the writer makes about the structure and style of the overall story, and then zoomed in to think about the page-by-page issues that make all the difference to how compelling the story is.

Author Elizabeth Fremantle helped us to explore the experience of being an author, the thoughts and feelings they might experience when someone starts picking their carefully constructed text to pieces. She

shared how an experienced author works and we discovered a little about where ideas come from and how they are developed, what happens when the words won't come and much more.

Experienced editor and SfEP Professional Member Loulou Brown showed us how to go about assessing a manuscript. There may be difficulties with regard to the plot and characters, and also problems relating to inconsistencies, anomalies and repetitions. Dialogue, pace, the 'show, not tell' principle and the vital importance of not only grammar and spelling but also punctuation, which so many authors ignore, were covered.

Finally, Aki Schilz, Editorial Manager at the Literary Consultancy, helped us to construct a reader's report. She emphasised that assessing and critiquing requires, in addition to sensitivity and judgement, a considerable feel for creative writing concepts and jargon, the ability to put critical points across in a way that makes sense and is unambiguous without being offensive, and a checklist of what it is important to cover in the report to give the client useful feedback and value for money.

Standards

Christine Vaughan

The financial year 2016/17 was a transitional year for the standards remit. In June 2016, mentoring was

moved to the training remit and Gerard Hill, the then mentoring and tests director, became standards director, with responsibility for standards, tests and complaints. In September 2016 Gerard became chartership adviser and I took on the role of standards director.

Standards

In May 2016, the council approved an outline framework of editorial qualifications. Work has begun on a four-part syllabus to match this framework; an accompanying textbook is planned. We have also identified a need for separate codes of practice for Corporate Subscribers and for members working on theses and dissertations.

An illustrated web page on standards in proofreading has been added to the website; a similar page on standards in copy-editing is planned.

Tests

By 28 February 2017, of the 125 people who had taken the basic editorial test, 65 passed first time (52 per cent of candidates) and 21 on resit: an overall pass rate of 69 per cent.

Updated editions of the two basic editorial tests were uploaded to the website in September. A third basic editorial test has been written and is being programmed in Question Writer, the software we use for the basic test. The council has agreed that some example questions should be written and put on the website so that potential candidates can see what sort of questions they will face in the basic editorial test.

Progress has been made on the advanced editorial test: a first draft is 80 per cent complete; when the remaining questions have been written, we will need to create the 'front end' and check the mark scheme and programming before we pilot it. TestReach, who provide the software we are using for the advanced test, have developed several features at our request, meaning that it will be possible, for example, for candidates to edit text (including captions and labels for graphics) with Track Changes.

Complaints

Two complaints against members were investigated in 2016/17, both citing poor-quality editing and

unprofessional behaviour. In the first case, it was found that the member had considerably improved the manuscript they had worked on but had fallen below the standards of the Code of Practice in their communications with the client and had introduced an unacceptably high number of errors and failed to follow best practice in copy-editing. In the second case, it was found that the member had not acted unprofessionally and that the copy-editing was not unsatisfactory but that there were flaws in the referencing. In both cases the complaint panel considered a small reduction in the agreed fee appropriate, and recommended suitable training for the members involved. At the end of the year 2016/17, the complainant in the second case lodged an appeal.

In addition, we received two enquiries which were resolved without developing into formal complaints.

Training

Stephen Cashmore

Training

During 2016/17, the numbers registering for online courses have remained about the same in total as in the previous year (1,009 in 2015/16; 1,035 in 2016/17), but this is in part because new courses are now on offer. Take-up of the older courses dropped slightly, but because 'Editing with Word', 'Medical editing' and the new copy-editing suite came online during the year, overall figures remained roughly the same. Table 6 shows the actual figures.

By coincidence, the same number of workshops were run during 2016/17 as were run during 2015/16: 28 of them (244 delegates).

The surpluses from the three types of training (online, in-house and workshop) for 2016/17 were as in Table 7.

Only two in-house courses were run during 2016/17. As reported in previous years, this is largely because the office staff do not have the time or experience to proactively look for in-house clients.

During the year a new workshop, 'Practical mark-up of PDFs', went live and has proved popular. The new proofreading suite went live after the end of the financial year, and will make an appearance in next

Table 6 Registration for SfEP online courses

| Course | Registered 2015/16 | Registered 2016/17 |
|---|--------------------|--------------------|
| Proofreading 1: Introduction | 593 | 456 |
| Proofreading 2: Progress | 119 | 99 |
| Copy-editing 1: Introduction (old course) | 142 | 79 |
| Copy-editing 2: Progress (old course) | 55 | 30 |
| Copy-editing 1 (new) | n/a | 47 |
| Copy-editing 2 (new) | n/a | 16 |
| Copy-editing 3 (new) | n/a | 7 |
| Brush up your grammar | 47 | 69 |
| Introduction to fiction editing | 38 | 31 |
| References | 15 | 29 |
| Editing with Word | n/a | 152 |
| Medical editing | n/a | 20 |
| Total | 1,009 | 1,035 |

Table 7 Surpluses for SfEP courses

| Course type | Surplus (£) 2016/17 | Surplus (£) 2015/16 |
|---------------------------|---------------------|---------------------|
| In-house training courses | 1,022 | 1,900 |
| Workshops | 7,096 | 4,116 |
| Online courses | 102,322 | 85,214 |

Table 8 Mentoring – summary

| | |
|---|---------|
| Number of mentees who completed during 2016/17 | 51 |
| Number of mentees active as at end of February 2017 | 26 |
| Income received from mentees 2016/17 | £3,497 |
| Expenditure on mentoring (payment of mentor fees) 2016/17 | £19,622 |

year's annual report. Meanwhile, work on developing three new online courses continues: 'Web editing', 'Editing theses and dissertations' and 'Editorial project management'. It is hoped that all of these courses will go live either towards the end of 2017/18, or at the start of the following year.

Mentoring

Proofreading and copy-editing mentoring has continued to thrive during 2016/17, but at a significant cost to the SfEP. The relevant figures are shown in Table 8.

The financial figures are skewed in that income is received from mentees quite a bit before the corresponding mentor costs have to be paid, but even so it is becoming clear that the SfEP cannot afford to continue to fund mentees with the current 50 per cent subsidy they receive. When there were few mentees and costs were lower, the Dorothy Mitchell Smith Memorial Fund was able to cover the relevant costs, but this is not possible nowadays. Changes to the funding of mentoring will therefore be made during 2017/18, to include a reduction in the subsidy level, and opening up the scheme to non-members. It is to be hoped that a more favourable financial position can be reported in the next annual report.

Vice-chair

Lucy Metzger

Like all my colleagues on the council, I could not do any of my SfEP tasks without the unflagging support, wholehearted commitment and good humour of our team in the office. We are also fortunate, as a council and more importantly as a Society, to have the wonderful help and good ideas provided by so many of our active and interested members. Please keep it coming, all.

My regular duties include the preparation of the AGM agenda and papers for discussion, which I am very happy to know you have read this far. I prepare the agenda for each council meeting, taking in the issues that directors propose as well as questions raised by members. I put together the [minutes](#) of these meetings and post them in the members' area of the website. I also compile an issue of [Council News](#) after each council meeting and send it out to all members.

Since the last AGM I have continued as a member of the strategy group (a committee of the council), and I have prepared notes of each of the group's discussions for presentation to the council. Just before the last AGM the council published their proposed [strategic aims](#) for the Society.

Following the 2016 AGM discussion of the council's proposal to retain discounts on SfEP training courses for all SfEP members (as opposed to the removal of some discounts proposed at the previous AGM) and to add further discounts as incentives to upgrading membership, I worked to ensure that these changes were clearly presented to the membership for further discussion and that members' questions were addressed by the council. The information director, Steve Hammatt, organised an electronic poll on the changes; members voted strongly in favour of them (details in this [Council News](#)), and the new policies took effect in March 2017.

One of our strategic aims is to increase membership engagement, and an important element of this is encouraging more members to contribute their time and skills to the Society. We decided to seek information from other organisations about how they support and manage volunteer contributors. The SfEP is a member of the Professional Associations Research Network (PARN), and as such we were able to commission PARN to 'ask the network'. In autumn 2016, the people at PARN helped me to develop some survey questions on volunteer support and engagement. The 26 organisations surveyed ranged in size from fewer than 2,000 members to more than 20,000. On average, 5 per cent of their members provided voluntary service, this percentage decreasing as organisation size increased. The three tips most commonly offered were to create clearly defined roles for volunteers, to show appreciation of their contributions, and to develop and maintain an infrastructure to support their work. We are taking this advice on board.

Even the longest-serving SfEP directors must ultimately step down, and so we sometimes need new directors to step up. This year I aim to make our approach to this more systematic and to raise members' awareness of the opportunity to be a director and the benefits of such service, both to the serving director and to the Society.