

society for editors and proofreaders

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sfep

upholding editorial excellence

Annual report 2018/19

This report covers the activities of the SfEP Council and the Society from 1 March 2018 to 28 February 2019, the period of the Society's financial year. It does not cover activity between 1 March 2019 and the publication of the report in August 2019 in preparation for the SfEP annual general meeting (AGM) on 14 September 2019.

Chair

Sabine Citron

Aiming for chartership

We sign off this annual report (covering the financial year to end February 2019) on a cliff edge: we handed in our petition for chartered status to the Privy Council Office on 23 January and, at the time of writing and possibly reading, are awaiting the Privy Council's decision. Chartership has been the focus of significant efforts this year: our chartership adviser, Gerard Hill, and I continued to meet with many organisations to let them know of our endeavour and to seek their support. We also spent a considerable amount of time preparing all the documents required for this application: petition, charter, bylaws and a list of non-objectors and supporters. And we are now updating our regulations, with invaluable help from Melanie Thompson, to cover everything not in our new bylaws.

We in the SfEP Council are very grateful to our members, who have supported us all the way and who voted by an overwhelming majority to apply for chartership and to approve the corresponding documents.

Our efforts to become a more professional organisation, to expand our network of contacts and to publicise what we are about will bear fruit even if we do not gain a charter. But we do hope, for the sake of all our members and the general public, that our profession will get the recognition and status it deserves.

Inner workings

2018 was the year the General Data Protection Regulation (GDPR) was rolled out and our outgoing membership director, John Firth, made sure we were ready for the move. The complaints system benefited from an in-depth review, begun earlier, but completed

and put to the test this year. We compiled a new Code of Practice for Corporate Members. And we made changes to the distribution of remits among directors.

Meanwhile, the office team remains invaluable to the organisation: thank you to Helen Martin, office manager, Shannon Humberstone, recently promoted to senior office administrator, Antonella Cianfagna, who has just joined the team as our administrative assistant, and Bridget Buckle, finance officer, who has now been with us for 15 years.

Our community

Whether or not it becomes chartered, the SfEP is first and foremost a community. Our forums, supplemented by a strong social media presence, have become the water cooler we gather around; they play an increasing role in breaking the isolation of the freelancer and in providing valuable information on editing, solo working, running your own business and life in general, all in an interactive, supportive and professional manner.

As this report shows, many of us have continued to actively participate in shaping the SfEP by volunteering our hours, expertise and commitment to help run the Society. You will find details about the many volunteering opportunities and the achievements of volunteers in individual sections of the report; everybody has something valuable to contribute and, ideally, we could all of us contribute to our membership organisation.

This year, as part of our professionalisation efforts, we have reviewed the guidelines given to local group coordinators, for example on communications and running meetings. The changes, some minor and others more complex, are part of a renewed focus on widening participation, and they aim to ensure that another of the Society's core community activities is safe and accessible, as well as legally compliant and inclusive.

Members were actively consulted on chartership, the vice-chair remit and the conference venue. But member views expressed daily on the forums, on social media and by email all help shape our policies.

Always learning

Continuing professional development (CPD) is at the core of our professional lives, throughout our careers.

Taking part in forum discussions, or simply taking or giving advice, is a form of professional development, as is every new job we take on. CPD can mean taking part in professional events, not least our stimulating annual conference, for the knowledge and network opportunities it provides; we were delighted that local group events and mini-conferences have taken off, this year with a successful event organised for groups in the south-west of England and another event in Toronto. The SfEP continues to offer a one-on-one mentoring scheme, the best training there is. And, of course, basic and advanced training is available for members throughout their editorial career. This year, there was a continued rise in the uptake of training and the launch of three new online courses.

Reaching out

This year has seen significant efforts in our marketing and public relations (MPR) and external relations (ER) remits. We have attended a large number of public events and reached out to many potential members, for example with a new Facebook campaign. Universities have been a particular focus of our attention, as you will see in this report. We have also started looking at rebranding because we will want to refresh our image whether or not we become a chartered body. And we are planning a new single platform to replace our website, member database, forums and online shop. All this is part of a focused effort to improve the image and status of us editors and proofreaders.

Chartership

Gerard M-F Hill, chartership adviser

In 2018 and early 2019, the chair and chartership adviser (CA) continued to meet chairs, chief executives and other officers of bodies whose interests impinge on ours, briefing them on our plans, exploring areas of common concern or possible collaboration and seeking their support for our petition. We received letters of non-objection from 20 organisations beside the support of our sponsor, the Department for Digital, Culture, Media & Sport.

Since the Privy Council Office (PCO) had expressed concern about the lexical overlap between the names of the two societies, we were particularly pleased to have the support of the Society of Editors. We

successfully consulted them, first to agree criteria for our proposed name and in due course to secure their support for the name chosen.

Following careful drafting and review of the petition, charter and bylaws, the documents were approved by the SfEP Council on 28 July 2018. An online extraordinary general meeting (EGM) was arranged for the week of 4–11 January 2019 to seek the approval of members in votes on two special resolutions:

- **Special Resolution 1:** To petition for the Society's incorporation by Royal Charter
- **Special Resolution 2:** To adopt the petition, charter and bylaws as approved by Council

Both propositions were backed by 98.4% of those who voted, comfortably exceeding the 75% threshold for special resolutions. The 'yes' voters represented 58.3% of the 883 Professional Members eligible to vote, well above the quorum of 5%.

On 23 January 2019, we delivered our documents to the PCO, with evidence of the EGM votes and a summary of our consultations with other bodies, showing whether any of them had objections to our submission or any comment on our proposed name. We also submitted the 2017/18 annual report and accounts, approved by members at the AGM on 8 September 2018. Being advised at the time of submission that the Privy Council would not give powers to grant chartered status to individuals in the first grant of a charter, we removed the corresponding clauses.

The CA will continue to inform members of the progress of our petition.

Community

Vanessa Plaister

It's been an eventful year for community, including appointment of a new director. Community continues to be at the heart of the SfEP's offerings, local groups and social media standing alongside the forums as the core tools with which SfEP members can connect, collaborate with, learn from and support each other. The SfEP relies on around 80 member volunteers to sustain its local group and social media work; the community remit is focused on fulfilling the SfEP's social and legal responsibilities to those volunteers,

as well as on enriching the membership experience by embedding equality, diversity and inclusion (EDI) policy and practices, as well as goals, into all of the SfEP's activities.

Local groups

For local groups, 2018/19 has been a strong year. Two new local groups were born – Devon (Plymouth), which complements Devon (Exeter) in coverage of the county, and Ely/Fenlands – and while two local groups fell dormant, no fewer than 14 groups saw long-standing coordinators hand the baton to new member volunteers.

Particularly strong has been local groups' commitment to organising special events. Both July's regional mini-conference in south-west England and that held in Toronto in November were hugely successful – with Toronto already planning another for this year and a north-east England mini-conference scheduled for May 2019.

The work of the north-east England team was complicated by the recognition of legal and financial obligations affecting all local group events. The community remit has consequently worked closely with the SfEP Council, the SfEP's financial adviser, the SfEP office staff and the north-east England team to develop and trial new procedures, and the resulting guidelines will be formalised and published later in 2019.

Social media

The SfEP has maintained a presence on three key social media platforms, Facebook, Twitter and LinkedIn, thanks to a committed team of volunteers. Summary analytics at year end, as shared with the social media team, revealed that audience engagement was far higher than that of the SfEP's nearest competitors, meaning that social media is/has the potential to be a key MPR tool for the SfEP.

These and other insights informed a strategic shift towards the end of 2018/19, and a specialist audit of the SfEP's activity across the platforms was scheduled to be followed in 2019/20 by training sessions for the social media team.

While the year saw several long-standing and valued members leave the social media team, new members have connected powerfully with the revised strategy.

Indeed, the enthusiasm and energy of the team that took the SfEP's social media into 2019/20 is such that it is with some sadness that the year will see the community remit handing social media (back) to MPR, where it more naturally sits.

Blog

Among the most significant events in 2018/19 within the community remit was recruitment of a new blog coordinator. Since August 2018, Abi Saffrey has published, on average, on a regular weekly basis, delivering commentary on a wide range of subject matter of interest to members and non-members alike.

Guest contributors have included, on linguistic prejudice, Erin Carrie (a senior lecturer in linguistics at Manchester Metropolitan University) and, regularly, Susie Dent; among contributing SfEP members have been Kasia Trojanowska on being a Polish editor of English, Stephen Pigney on working with authors writing in English as a second (or other) language (also known as non-native authors), and Sarah Grey on inclusive language and inclusive editing. These have been among the blog entries stirring most engagement in 2018/19.

Equality, diversity and inclusion (EDI)

As the 2018/19 financial year drew to a close, the SfEP's inaugural EDI audit came into focus as a first step towards embedding inclusive policy and practice into all SfEP activities. The content had been drafted and a communications strategy proposed, aiming to maximise response rates; the audit was scheduled for delivery in April 2019, and the insights it delivered were to supply the building blocks for development in 2019/20 of an EDI policy that would be meaningful for the SfEP and its members.

While many members have long affirmed that the SfEP is a warm, welcoming professional space, we should be proud to move forward into 2019/20 clearly signalling our commitment to ensuring that the SfEP *is* that space for *all* of its members and to enriching the experience of every SfEP member.

This is but one of the initiatives that make this an exciting time for the SfEP and your support is everything. Thank you to everyone who has contributed and is contributing to this and all of the work that falls under the community remit.

Conference

Beth Hamer

Conference 2018

The 29th SfEP annual conference was held at Lancaster University on 8–12 September 2018. It attracted a record number of delegates – 173 in total, with 153 residential delegates – and was well received, with an overall rating of 4.5 out of 5. Delegates scored the balance and variety highly (4.7 out of 5), and complaints mostly related to the standard of accommodation and food. All comments were noted and will be considered when choosing future conference venues. The 2018 conference had a surplus of £9,588, of which £6,000 has been put towards the 2019 budget in order to hold prices at the same level for another year.

Conference 2019

Preparations for the 2019 conference began in earnest in January, with a meeting attended by conference team members Kia Thomas and Claire Handy. We have tried to ensure that there are sessions for people at every stage of their editorial career, from beginners to those with more experience looking to diversify.

The exhibitors' fair at the 2018 conference was somewhat disappointing despite the efforts of Sherona Treen-Coward (the sponsorship coordinator) to encourage local businesses to get involved with pop-up shops. For 2019, we are introducing a range of branded items for sponsors that we hope to use to create goodie bags for delegates. We are also taking a more targeted approach for the exhibitors' fair, presenting a tailored package for a carefully selected group of companies and organisations. We hope that this will refresh the offering and make it more relevant and interesting to our delegates.

As in 2017/18, we offered 10% discounts to ten sister organisations: the Society for Editing (ACES) (USA), Mediterranean Editors and Translators (MET), the European Association of Science Editors (EASE), Editors Canada, the Northwest Editors Guild, the Institute of Professional Editors (IPEd) (Australia), the Professional Editors' Guild (PEG) (South and southern Africa), la Unión de Correctores (UniCo) (Spain), the International Society of Managing and

Technical Editors (ISMTE) (North America), and the Society of English-language professionals in the Netherlands (SENSE). Most have offered reciprocal discounts to our members for their conferences and other events. I am grateful to Lucy Metzger, the ER director, for taking over responsibility for this.

Since the start of the new financial year (2019/20), plans for the Aston University conference have continued and places are selling well.

We put in place a very basic policy about harassment for the 2018 conference in response to a member's suggestion and Vanessa Plaister, the community director, has now taken on responsibility for developing this in line with her other work on the Society's EDI policy.

Future conference venues

Following the feedback from delegates about the standard of accommodation at Lancaster University and considering the time spent each year by the conference director in finding a conference venue, I consulted members about a variety of options, including business as usual, using one venue for a set number of years and alternating between two venues, one in the north and one in the south. All the options had pros and cons, and in the end there was no clear consensus for any one of them. What became clear was that the standard of accommodation is important to many delegates, but they also enjoy the novelty of going to different places each year. Some also said that they went to their first conference because it took place close to them and they have gone regularly ever since. The outcome of the consultation was that the conference should continue to travel around the country, with a plan for venues in the north in 2021 and the south in 2022, and back to Aston in 2023.

Conference 2020

The 2020 conference will be held at Kents Hill Park in Milton Keynes, a purpose-built conference centre that provides good-quality accommodation and facilities under one roof. At the time of writing, I have identified potential venues for both 2021 and 2022 in line with the outcome of the member consultation, and I hope to make a final decision about these over the summer.

External relations (ER)

Lucy Metzger

The ER remit was vacant February–September 2018. As vice-chair during this period, I took forward some initiatives that the previous ER director, Ayesha Chari, had set in motion: building and maintaining links with partner organisations, supporting and expanding our team of SfEP ambassadors, and developing our bank of resources for their work. I formally took up the ER role in September.

Ambassadors and events: spreading good SfEP practice

Our ambassadors did wonderful work this year, delivering presentations, helping at events and running informal Q&A sessions. They have developed PowerPoints and exercises for various kinds of group, and our splendid SfEP office team ensure they are supplied with banners, leaflets and other resources.

- A number of volunteers represented us at the **London Book Fair** in April 2018 and at **Society of Young Publishers** events in March (Edinburgh) and November (London).
- The **Bloomsbury Institute** asked the SfEP to run a panel discussion in October on the working relationship between freelancer and publisher. Abi Saffrey planned and chaired the session. Our members were given discounted tickets and a video was available afterwards.
- Alison Shakspeare was invited to return to **Plymouth University** in October to repeat her 2017 presentation to its publishing course on editorial work.
- Hilary Hammond delivered a presentation and discussion on editorial work via Skype for publishing students at the **University of Central Lancashire** in December.
- **Roehampton University** asked for a seminar on proofreading and copyediting as part of its Publishing MA course, which Jill French delivered in February.
- The development office for **Bradford libraries** asked for an SfEP presentation on the author–editor relationship for its writers’ group. Roz Fairclough delivered this in February.
- Kasia Trojanowska delivered a presentation on proofreading and copyediting to a group of

publishing students at the **London College of Communication** in February.

I am endlessly impressed with the commitment and enthusiasm shown by these people and by our many other helpers, and impressed too by the good ideas our members come up with for promoting our messages and standards. Our whole Society benefits in countless ways. I thank all of you who have helped us all.

I will aim for repeat visits (we’ve already been invited back at some places). We also plan to send ambassadors to other writers’ groups and festivals in 2019/20, including Frome and Wigtown, and I have been corresponding about future presentations for other university publishing courses, among them Edinburgh Napier, University College London, Middlesex, Oxford Brookes, and City, University of London.

Letting academics know about our members’ services

All 170 UK higher education institutions (HEIs) – universities and colleges – will be taking part in the Research Excellence Framework (REF) 2021, an assessment of the quality of individual research outputs. REF scores will directly affect the future research funding that HEIs receive. To help promote the SfEP Directory to academic authors, 12 of our members volunteered to find contact details for a research officer or REF champion at each of the 170 HEIs. These volunteers showed all the thoroughness and efficiency one could want, and I am deeply grateful to them. I emailed all 170 contacts in February, encouraging them to point their colleagues towards our Directory. I also took out six paid adverts for the SfEP Directory, running across a year, to be placed in mailshots sent out to thousands of individual researchers who subscribe to *Research, a platform that helps researchers obtain funding.

Partner organisations

The SfEP has always sought out links with other professional and membership organisations for mutual advantage, from knowledge-sharing to professional benefits for members (eg discounts on membership, conferences and/or training). At the time of writing, we have such arrangements with 17 organisations and the variety among them nicely reflects the wide range of professional practice among our own members.

- Some have international reach, including the Alliance of Independent Authors (a new partner this year), the Association of Learned and Professional Society Publishers, the International Association of Teachers of English as a Foreign Language, and the International Society of Managing and Technical Editors.
- Some are UK-based, including the Society of Indexers, the National Union of Journalists, the Society of Authors (another new partner) and the Society of Young Publishers.
- Some are overseas, including Editors Canada, the Editorial Freelancers' Association (another new partner) and the Society for Editing in North America; the Institute of Professional Editors in Australia; and the Professional Editors' Guild in South and southern Africa.

As well as regularly reviewing and updating our present partnership arrangements, I continue to seek out new ones. Some of our most useful connections have arisen from initiatives taken by our members at large; I am always keen to hear from members about potential new partners.

Finance

Mark Robinson, external financial adviser

I am pleased to report that the figures for the year ending 28 February 2019 show a healthy surplus. The surplus for the year has increased the strength of the balance sheet, which now shows net assets of £674,763, up from £537,917 in 2017/2018.

The detailed income and expenses are shown in our accounts.

This year has seen a 9.6% income increase, from £541,443 last year to £593,409 this year. Income from membership subscriptions rose by £36,059 in the year. Income from training has increased to £186,314, although there has been less income from workshops and more from online training. This has contributed to the increase in the surplus on training to £119,238.

Figure 1 shows what your subscription paid for in 2018/19.

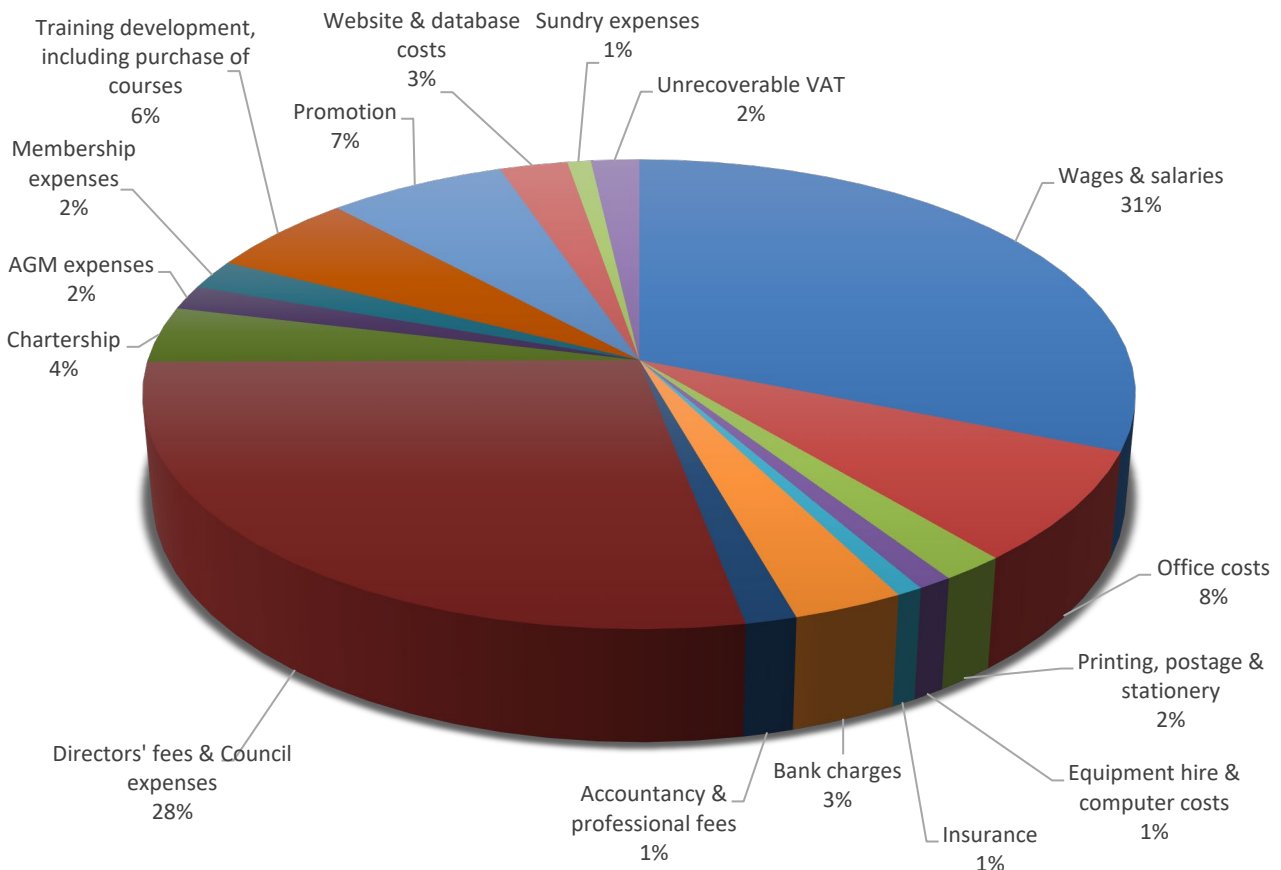


Figure 1 What your subscription pays for

Administrative expenses are in control and declined only slightly this year. This is the result of careful management of resources.

Directors' fees have reduced from £87,386 last year to £80,852 this year. The first 18.5 hours of each month each director works continue to be unpaid.

The surplus this year is due to budget allocations not yet being spent and to the large outgoings we are facing in the coming year, notably employing a new administrative assistant, new training courses and events, an entirely new and updated e-platform encompassing our website, forums, emails, member database and e-shop, and the significant expenses we would face in the transition to a chartered body, if our bid proves successful.

I am looking forward to the year ahead, continuing to support Bridget and the team in the office.

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

Information

Margaret Hunter

Publications

We now have an almost complete set of revamped **guides**, with updates to existing guides published and some new titles added, all in a new eye-catching design. An update to the last title in need of zhuzhing, on plain language, will have been published by the time you read this (as will a new guide on editorial project management). Many thanks to our wonderful authors, updaters, editors/proofreaders and designers.

To celebrate the **SfEP's 30th anniversary** on 26 November 2018, we published a collection of articles from each year of our magazine. It was interesting to see that some editing problems never go away, but it's also remarkable how much some things have changed. It was also delightful to catch up with past members whose writing was featured. Members can download a free copy of *Editing Still Matters* by logging into the members' area of our website. It's also available to buy in hard copy from our online

shop if you'd like a copy to keep for posterity. Thanks to Kasia Trojanowska for helping me to choose the articles.

Thanks to the **Editing Matters** team – editor Hazel Reid, copyeditor/designer Rich Cutler and proofreader Rod Cuff – for another year of interesting issues of our magazine. [Hazel](#) would love to hear from members with ideas for future content, and she welcomes views and counterarguments on any published article.

Our outward-facing e-newsletter, **Editorial Excellence**, has proved popular, with subscriptions continuing to rise. [Liz Jones](#) remains as editor for another year and is doing a splendid job.

Busy members behind the scenes

We now have a **design team** working on layout of SfEP documents and publications. It's great to be able to place this work internally if appropriate. Members who have good skills and experience in InDesign may apply to me to [join the team](#). Work is paid at our subcontractor rate.

An exciting new initiative is our **resources team**, who are helping me review, plan for and produce new information resources. Our first target was to review and replace the very tired paper welcome pack sent to new members. In true chicken-and-egg style, this led us to a wholesale audit of our website content and subsequent plans to rewrite, reorganise and simplify everything. We have made a great start with new pages on membership. [Take a look!](#) And look out for more web content improvements in the coming year. Many thanks to Ben Dare, Sara Donaldson, Mary Hobbins, Graham Hughes, Janet MacMillan, Peter Norrington, Alison Shakspeare and Cathy Tingle, and my co-director Denise Cowle.

Internal publications

Thanks to the collective effort of the resources team, new members now receive a PDF **Members' Handbook** with need-to-know information to get them started. It's available for any member to download in the members' area of the website.

Two new important **procedural documents** were finalised, the Directors' Handbook and the SfEP Style Guide.

Looking ahead

Lastly, I have been working with our chair and MPR director to prepare for organisational rebranding. We *hope* this will coincide with a grant of chartership, but whatever happens it gives us a great opportunity to review how we present ourselves – and, crucially, how others see us.

Internet

Richard Hutchinson

This year has mainly been focused on transition. John Espirian stood down as internet director at last year's AGM, and he spent a good proportion of his last few months tidying up and writing extensive, detailed handover notes; correspondingly, a good proportion of my time during this period has been spent in picking things up, learning how things work and trying not to break things.

I'd like to extend my thanks to John, to the web development team and to the forum moderators for all that they have done and continue to do in maintaining our online presence, for being cooperative and for being patient with me!

Website

Table 1 adds to the statistics published in previous years to show that website traffic continues to grow. Figure 2 (see next page) provides a summary showing

the major user flows through the site from March 2018 to February 2019, indicating the relative numbers of visitors from different locations, and showing the importance of the Directory, the various member pages and the information on training.

This need to provide useful information to members, to potential members and to potential clients means that the website is growing rapidly and in various directions. We are actively investigating ways of catering for this expansion and for the future expansion of the Society, to provide more and better services, and to make development and maintenance as straightforward as possible.

Forums

The forums go from strength to strength, with many members seeing them as the main benefit of belonging to the Society. Table 2 (see next page) shows how activity has increased over the last year.

In order to show off this benefit to potential members, we experimented with a Facebook ad campaign that allowed potential new members access to a new taster forum, so that they could see how the forums work and could ask questions that hopefully would help them to join the Society. This forum was not otherwise generally visible and thanks are due to a number of members who agreed to 'represent' the Society there. It is now dormant while we review how we might use this resource more in the future.

Table 1 Website visitor figures

Period	Total visits	Unique visitors	Page views		
			Unique	Total	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
2017/18	326,734	194,188	897,704	1,020,608	3.48
2018/19	364,567	222,335	966,468	1,223,974	3.36

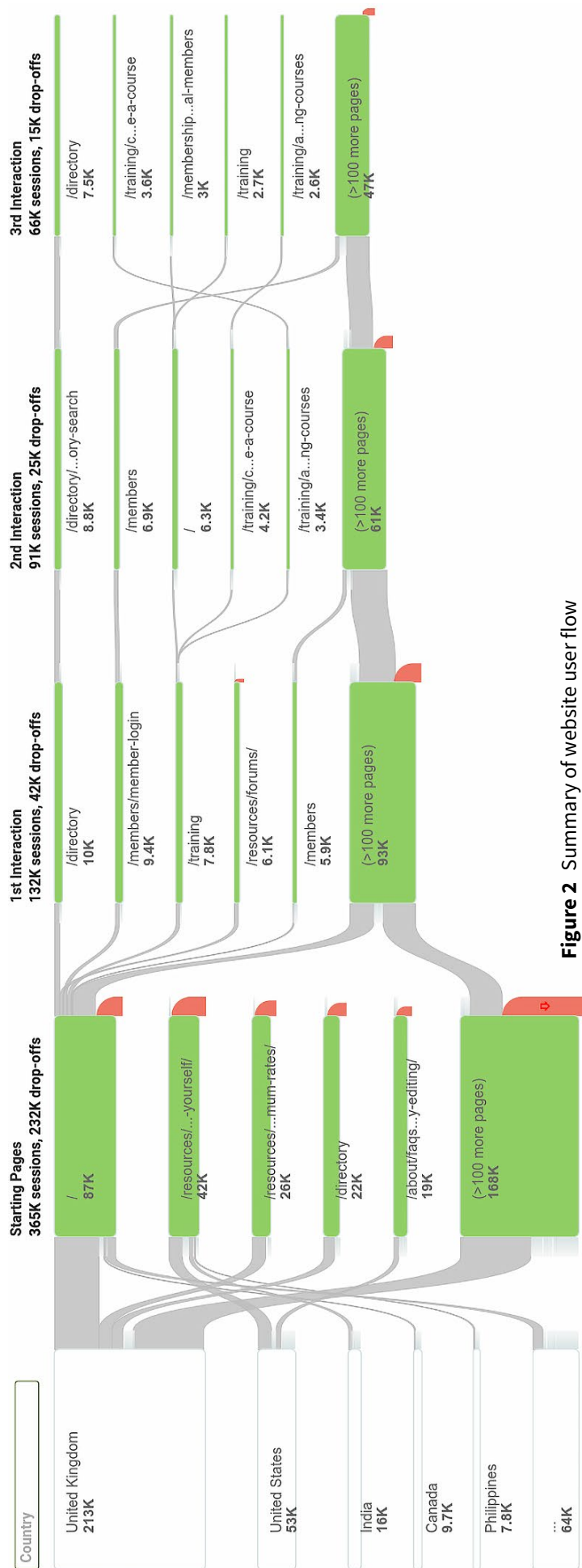


Figure 2 Summary of website user flow

Table 2 Forum usage

	May 2018	April 2019
Total topics/threads	17,612	20,280
Total posts	156,050	182,947
Total users	2,080	2,326
Active users*	606	760
No. users with at least 1 post	1,153	1,320
No. users with at least 50 posts	289	323

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

Conference app

We have decided this year to experiment with providing an app to help conference-goers plan their days and enhance their experience. Feedback on how well this works and suggestions for improvement will be gratefully received.

Marketing and public relations

Denise Cowle

This has been a busy year as we introduced some exciting new ways of promoting the Society. Alongside advertising in a variety of publications and raising our profile at events, we have focused on increasing engagement on our social media channels to encourage people to join us, use our directory and purchase our training courses.

Advertising

We have continued to advertise the Society in traditional print publications and online. The focus of these adverts is to raise awareness of the Society and, in particular, how to find a reputable editorial professional by using our Directory.

Events and sponsorships

In this reporting year, we have promoted the Society through exhibiting at conferences, sponsoring events and sending leaflets where a member couldn't attend in person. The Society has been represented at or on:

- the Society of Young Publishers (SYP) Scotland conferences, Edinburgh, March 2018 & February 2019
- the International Association of Teachers of English as a Foreign Language (IATEFL) conference, Brighton, March 2018
- the London Book Fair, April 2018
- the Alliance of Independent Authors (ALLi) Self-Publishing Advice online conference, April 2018
- the IATEFL Materials and Writers special interest group (SIG) conference, Oxford, June 2018
- the Hot Copy podcast, June 2018
- the MET conference, Girona, Spain, October 2018
- the ALLi Self-publishing Advice online conference, October 2018
- the SYP conference, London, November 2018
- the English Language Teaching (ELT) Freelancers' Awayday, Oxford, January 2019.

The editors' round tables produced for the ALLi online conferences are one-hour discussions between members on editing topics of interest to independent authors. You can see them on the Society's YouTube channel.

We also created promotional discount codes for SfEP membership at specific events and donated giveaways and raffle prizes.

Videos and photography

If you were at our 2018 conference in Lancaster, you will have spotted our videographer, Ross Coverdale. He recorded lots of general footage and interviews, which we are using to make promotional videos for the conference and for the Society in general. We also hired a professional photographer for one day to capture the flavour of the conference. We are using the videos and photographs to make our website more attractive and on social media as part of our overall marketing strategy.

Social media strategy

In February 2019, we commissioned a social media strategy review by an external social media consultant, Cathy Wassell. She reviewed our activity on Facebook, Twitter and LinkedIn, and the key customer journeys on our website.

This provided us with practical advice on how to make the best use of the time our social media team spends on creating and publishing posts. The focus is

to foster genuine engagement with people and bring them closer to either becoming members or enrolling on a course or workshop. We hope you notice a difference in the tone and content of our posts now!

Facebook advertising campaign – breaking new ground!

Working closely with Cathy, the Society ran its first ever Facebook advertising campaign in February 2019, with the aim of attracting new members. We created a taster forum (thanks to Richard Hutchinson, internet director), where non-members could get the flavour of our forums to see what they were missing.

The campaign used two videos focusing on the benefits of membership – specifically, the forums and the training we offer.

The posts targeted those demographic groups most likely to be interested in membership and more than 65,000 people saw them, with 1,100 people clicking through to a custom landing page for more information.

The SfEP Council has learned a lot from this campaign about our procedures and potential barriers to people joining the Society, and we are actively looking at how to refine them to make the joining process smoother.

We also used paid Facebook ads to boost some of the London-based workshops, which resulted in an increase in non-members attending.

Encouraging new graduates pursuing an editorial career

The Society recognises that membership fees and training costs can be a barrier to new graduates and is looking at ways of supporting new entrants to the profession. In response to feedback, in February 2019 we began trialling an introductory offer for new graduates of publishing courses who want to pursue an editorial career. For the moment, we are targeting specific events and selected publishing courses to assess its effectiveness.

Targeting our resources effectively

At times, members express their concerns that they don't see enough marketing and promotion by the Society. To make the best use of our time and budget, we focus our efforts where they will get the best results, and often that means advertising and

exhibiting where people who are already members will not see it. We hope you understand!

I would like to thank the social media team for their ongoing commitment and support, and everyone who has volunteered their time to promote the SfEP over the past year. Whether you volunteered at a stand for an event, gave a talk, distributed leaflets locally or liked and shared our social media posts, your enthusiasm for our profession and the Society shines through, and I know that this has done much to encourage others to sign up for our training or take out membership.

Membership

Sue Browning

As of 28 February 2019, we had 2,794 individual members (including 26 Retired Members) and 32 Corporate Subscribers. This means that the Society had a net gain of 128 members over the course of membership year 2018/19. Our membership mix remains very similar to last year: of our individual members, 14% were Advanced Professional Members (APMs), 19% were Professional Members (PMs) and 12% were Intermediate Members (IMs). This means that nearly 45% of our members have demonstrated training and experience, compared with 31% in 2015, when our new grade structure was introduced. This would seem to be a positive trend in that it demonstrates that our new structure is having the desired effect in encouraging members to undertake CPD and develop their professional careers.

However, lapse rates remain very high, especially among Entry-Level Members (ELMs), perhaps because many people join as they are testing the waters of an editorial career, maybe to take advantage of our discounted training and other benefits, and they either find editing and proofreading is not for them or that it is not sustainable. Looking at the reasons people give for leaving the Society, it is clear that economic concerns are a strong influence, but ill health and changing family circumstances are also significant factors. And we naturally lose members at the other end of their career, as they move into retirement; our Retired Members increased in number from 18 to 26 in the course of this membership year.

The seven-year limit

When we introduced the new grade system in 2015, in support of our aim to become a more professional organisation and promote high standards, we established limits on how long someone can remain a member without progressing to one of our Professional grades. ELM/IM membership is therefore limited to seven years in total (four in IM). We chose to look back only as far as 2012, so this February saw the first set of members who were Associates in March 2012 and have not upgraded to Professional level reaching the end of their seven-year permitted membership. The 41 ELMs and 26 IMs affected by this rule were contacted early in 2019 and encouraged to upgrade. Inevitably, some of these members will choose not to upgrade (for various reasons, including nearing retirement or not doing enough editing-related work to qualify) and their membership will simply lapse. This will have an impact on our membership numbers, this year and in subsequent years, though, at the time of writing, it is too early to say just how great this impact will be. Those who will be affected in 2020 will be contacted to remind them of their situation and set out their options.

GDPR

May 2018 saw the introduction in the European Union of the GDPR, which sets out the rights of individuals concerning the data we hold about them and what we do with it. To meet this Regulation, we registered with the Information Commissioner's Office and carried out a Data Protection Impact Assessment, which resulted in the publication of our new [Privacy Policy](#), which tells people what data we hold on them and for what purpose, as well as setting out individuals' rights to access, rectify and delete that data, and to restrict its processing by the Society. This is backed up by a Data Protection Manual, which sets out the processes through which our staff, the directors and those who operate on our behalf will obtain, store and protect that data. This is a living document that will evolve with our needs.

Organisational

Martin Walker

At the 2018 AGM, a resolution was passed to replace the previous single post of vice-chair by up to three

directors who would act as joint vice-chairs while fulfilling other directorial roles on the Council. The largely administrative functions of the former vice-chair role, carried out until the AGM by Lucy Metzger, were to be taken over by a new role that the Council agreed, shortly after the AGM, to call organisational director. Having been elected to the Council at the September 2018 AGM, I took on this role and was therefore active as organisational director for less than six months of the reporting year.

The other members of the Council have been immensely helpful in helping me to define and shape the new role. Particular thanks are due to Lucy Metzger for her comprehensive handover of the parts of her former role as vice-chair that I was picking up.

The organisational director's remit includes the organisation of Council meetings, including dates, agendas, venues and minutes, the organisation of the AGM, and liaising with our company secretary over legal and procedural requirements. The period from September 2018 to February 2019 covered three Council meetings, two of one day and one of two days. In addition, the organisational director deals with many backroom issues, such as reviewing how documents are organised and stored, and tracking the implementation of decisions made. A large part of the remit could therefore be described as inward-facing, to a greater degree than most other directors. However, I have found that the most interesting and rewarding part of the role is in writing Council News

and receiving members' feedback on its content and usefulness. Please continue to engage with me or other directors on any aspects of Council News.

Professional development

Anya Hastwell

The financial year 2018/19 was a busy one for the professional development remit as I organised the SfEP's fourth professional development day on education publishing.

Upgrades

In the year from March 2018 to February 2019, the Admissions Panel dealt with 231 upgrade applications, an increase from the 222 received in 2017/18 (see **Figure 3**). A total of 116 (50%) applied for Intermediate membership, 87 (38%) for Professional membership and 28 (12%) for Advanced Professional membership. Meanwhile, 9 applications (4%) remain in progress, mostly due to waiting for referees or additional information from applicants. Some 12 applicants (5%) were completely unsuccessful and so remained at the same grade, while 6 (2.5%) were awarded a level lower than that applied for. Therefore, the total successful upgrade figures are as follows: 111 were awarded Intermediate (48%), 72 were graded Professional (31%) and 27, Advanced Professional (12%).

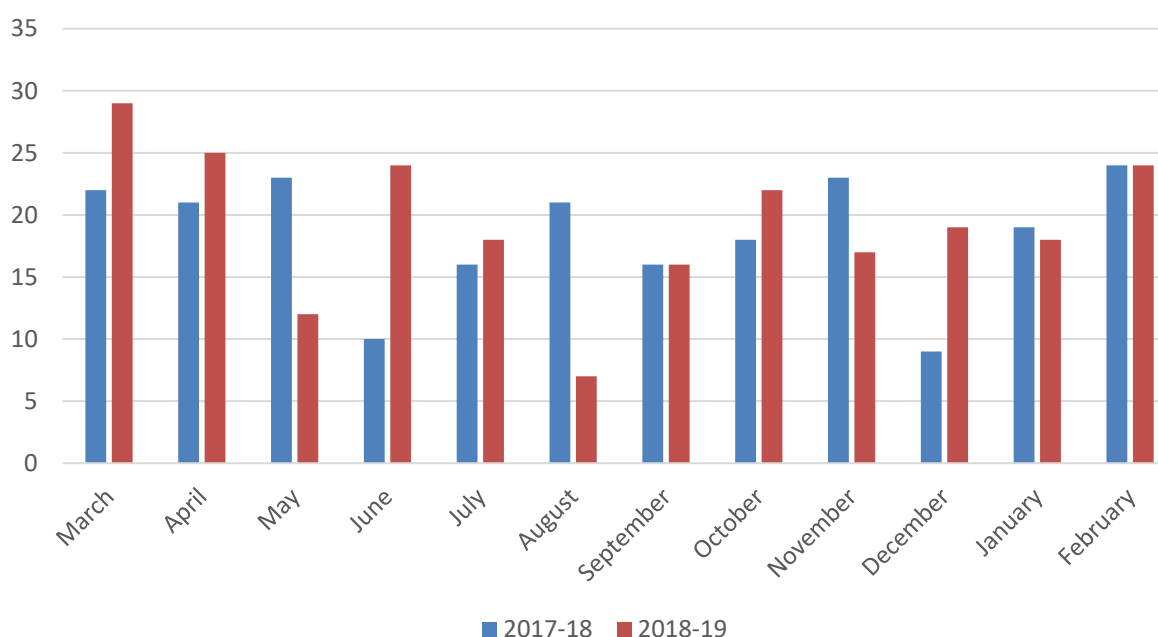


Figure 3 Number of upgrade applications 2018/19 in comparison to the previous year, by month

The Admissions Panel

The Admissions Panel currently has nine members, who continue to work hard behind the scenes to ensure that all applications are dealt with fairly and efficiently. One Panel member stepped down in September 2018 and another in February 2019; on both occasions, new members were recruited without trouble and started shortly afterwards. 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 being 14 days. Occasionally, applications take longer than the norm – most often down to the time taken by referees to respond to our requests.

Educational Publishing Update: professional development day 2018

Continuing professional development is essential throughout a copyeditor/proofreader's life. A professional development day for educational publishing took place in London on 12 November, with 55 confirmed attendees. Four experienced speakers covered many aspects of working with educational publishers, including digital technology and its influence, the challenges faced by both publishers and freelancers, and how the sector responds to curriculum changes (UK and overseas). The event was primarily aimed at providing those already working within educational publishing with an industry update, some extra food for thought and a skills refresher, but still accessible and useful to those new to the field who may be considering a move into this sector.

The content of the presentations was seen as being largely helpful, informative and inspiring by most of the delegates; the venue and the facilities were excellent; the speakers were all happy for their presentations and handouts to be shared with the

delegates afterwards. Suggestions for future SfEP professional development days from members' feedback included: working outside your core subjects (for people new to publishing or those who want to develop their client base and subject content to other areas); LaTeX editing; practical curriculum mapping; sci-fi/horror/fantasy editing; children's publishing; and memoirs/autobiographies.

I am extremely grateful for having had the opportunity and the privilege to serve on the SfEP Council alongside such hard-working, inspiring and supportive people. It has been a rewarding challenge and I very much hope to offer support to its endeavours in the future too.

Standards

Hugh Jackson

There has been much to do in the standards remit over the last year and the next will be even busier. The position was established in 2016 and the previous standards directors – Gerard M-F Hill, Christine Vaughan and Ian Howe – have made huge advances in promoting high editorial standards. We have been lucky to benefit from their hard work.

Code of Practice

A new Code of Practice for Corporate Subscribers has been drafted and approved by Council. This will start to be circulated to Corporate Subscribers for signature in the coming year. As the number of Corporate Subscribers continues to increase, this Code of Practice, under which Corporate Subscribers agree to pay their SfEP freelancers fairly and promptly, brief them well and respect their working practices, among other things, will help to protect our members. It will also help to provide Corporate Subscribers with clarity around freelancers' priorities.

Complaints

After a series of complaints in late 2016 and early 2017, a new complaints procedure was drafted and has been in place since March 2018. This made important improvements in the handling of complaints, primarily in ensuring that the complaints system is independent of the Council. This work was vital for our chartership bid and will help to ensure an even-handed and professional complaints system to

support the Society as it grows. We are indebted to previous standards directors for their excellent work on this. Details of the complaints system can be found on the website.

The new complaints system was used for complaints received in November 2018 and January 2019, and details of those complaints have been issued in *Editing Matters*. Feedback from the complaints has been used to make minor improvements in the complaints process.

We would like to express our great thanks to all of those who have (anonymously) agreed to serve, if asked, on the Complaints Panel and to those who have given their time on the two complaints received under the new procedure.

Editorial tests and syllabus

The SfEP has offered the basic editorial test since 2014. By 28 February 2019, 231 people had taken the test, with 129 (55.8%) passing first time and 32 after resitting: an overall pass rate of 69.7%. The pass rate is in line with projections and has remained fairly steady since the test was launched. We would encourage everyone who has not yet taken the test to consider doing so.

To support the development of the tests, changes to the test fees were approved by the Council and take effect from 1 March 2019. These new test fees will help to pay for improved software and the expansion of the test suite, to include a third iteration of the basic test and an advanced test.

Part of the test development project has been to move the current test from the current software, QuestionWriter, to a more advanced platform, Test Reach. This is now moving ahead rapidly, and it is very much hoped that by conference this system will have been completed, evaluated, tested and launched. Test Reach is more reliable and resilient, and it offers more advanced question types, which should prove a significant help as the test suite expands.

The editorial syllabus has been made aesthetically easier for candidates to navigate and the content will be revised in the coming year.

The self-test, which non-members (and indeed members) can use to help them decide whether they'd like to work as a proofreader, has been revamped, designed to be more user-friendly.

If we become chartered (and even if we do not), we are also considering the feasibility of introducing an entry test. This will be a test for prospective new members to ensure that we admit only candidates who can show a firm understanding of the English language.

Student standards

There has been a consistent call for the development of a code of practice for members working with students on their assessed work. This is in development and will be put to a panel of specialists for improvement soon.

Priorities for the coming year

We will prioritise the following activities over the coming year:

- improving the content of the editorial test syllabus
- moving the basic editorial test to Test Reach
- launching a third basic editorial test paper
- developing the advanced test
- introducing an entry test
- developing a code of practice for student assessed work.

This is ambitious, and rightly so. The SfEP has always demonstrated a commitment to increasing editorial standards; that is only intensified by the prospect of chartership. Anyone with views about how to improve our standards is very welcome to email the [standards director](#).

Training

Jane Moody

Online courses

During 2018/19, the numbers registering for online courses have continued to rise. As in previous years, Proofreading 1: Introduction was the most popular course.

New courses

The three new courses launched last year have taken off, with Proofreading Theses and Dissertations being the most popular. A new course shell (the template into which our courses are set) was developed during the year. All new online courses will be in the new

style. The first to take advantage of our new look is *Editing Digital Content*, published at the end of the year, which looks at the interactive elements of (mostly) educational publishing. This is the first of a series of courses looking at specific elements of the publishing process, expanding editors' knowledge and skills into the wider setting of publishing.

Workshops

The Introduction to Proofreading workshop has run four times this year, and the Introduction to Copy-editing course has run once only. A second course was scheduled, but was cancelled for lack of numbers. Brush up Your Grammar was run as a pre-conference workshop.

In-house courses

We ran several tailored workshops for other organisations and companies in 2018/19. These courses are based on our standard courses, but use materials supplied by the company. Courses may be off-the-peg or can be adapted to suit the company's needs. This year, proofreading was the most popular topic.

Mentoring

Mentoring numbers continue to be lower than we would like. As this is a one-to-one learning experience, mentoring does not come cheap, but those who have completed the training are always enthusiastic about its great benefits. We are looking into ways of making the scheme more sustainable.

Vice-chairs

Sue Browning, Lucy Metzger and Jane Moody

At the 2018 AGM, a resolution was passed to replace the previous single post of vice-chair by up to three directors who would act as joint vice-chairs while fulfilling other directorial roles on the Council. The administrative functions of the former vice-chair role, carried out until the AGM by Lucy Metzger, were taken over by the new role of organisational director. Jane Moody, training director, Lucy Metzger, external relations director, and Sue Browning, membership director, became joint vice-chairs.