

society for editors and proofreaders

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sfep

upholding editorial excellence

# Annual report 2019/20

This report covers the activities of the Society for Editors and Proofreaders (SfEP) and its Council from 1 March 2019 to 29 February 2020, the Society's financial year. It does not cover the activity of its successor, the new Chartered Institute of Editing and Proofreading (CIEP), from its inception on 1 March 2020 to the publication of the report in June 2020, in preparation for its annual general meeting (AGM).

## Chair

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### Sabine Citron

#### Chartership

This has been a momentous year for the SfEP. We had first agreed to apply for chartered status in 2015. Since then, Gerard Hill, our chartership adviser, and I had numerous meetings with official bodies and related organisations and spent much time preparing all the documents required for the application the SfEP submitted in January 2019. We then collectively had several months anxiously waiting for the Privy Council's decision. We finally heard in July 2019 that our application had been successful. This decision took legal effect once the Great Seal had been affixed to the vellum copy of our charter. As you know, we shared the news with our members and made it public at our AGM on 14 September 2019.

The SfEP Council and its chartership adviser then spent the next few months preparing to relaunch as the CIEP. This involved notifying our supporters and other contacts, finalising our new internal regulations (formally approved by our members at an extraordinary general meeting (EGM) in November 2019) and many other administrative steps. It also involved an extensive rebranding effort, the result of which you can now see in all our platforms and publications. I hope you like the new brand as much as we directors do. Last but not least, we settled on an official date for the move from the SfEP to the CIEP, the first day of our new financial year, 1 March 2020.

Sadly, our plans for celebrations were somewhat thwarted by the pandemic, but our goals remain the same. As a chartered body, we now have the authority to define and set standards for the editorial profession, in the public interest, while giving editorial practitioners a voice, promoting awareness of standards, helping to protect clients against

incompetent or unprincipled practitioners and generally giving public recognition to our long-established but still undervalued profession.

We are grateful to all our members who supported this initiative throughout the process. I hope that belonging to the CIEP will encourage many of you to take your continuing professional development (CPD) even more seriously and to progress within the organisation, helping to spread the message that editing and proofreading are skilled jobs that require professional training and continuous updating of skills.

#### Behind the scenes

At a less public level, we have continued to focus on making our organisation a more professional one. As well as fully revised versions of all our founding documents and regulations, we are preparing new versions of our codes of professional practice and disciplinary and complaints procedure, as well as new equality, diversity and inclusion policies. We have also engaged the services of a professional human resources consultant to join our team of other consultants: accountants, financial adviser and company secretary. And we are exploring future governance structures with the advice of a professional chief executive officer.

There have been significant changes in our office team but the office remains the place where it all happens. After the departure of long-standing office manager Helen Martin, Shannon Humberstone, senior office administrator, took on most of the tasks associated with running the office with the help of Antonella Cianfagna, administrative assistant. Shannon and Bridget Buckle, our trusted finance officer, have ensured the smooth running of the office while preparing for our move from the SfEP to the CIEP, with all the additional administrative steps this involves. We owe them a big debt of gratitude.

#### A community of members

I would like to reiterate here that the CIEP, like the SfEP, would be nothing without the contributions of a large team of dedicated volunteers. In local groups, on the social media team, at conference or at national events, or simply by giving advice on our forums, many of you play a key part in our daily life and in our future.

We hope that our enhanced status as a chartered organisation will encourage more members to join

and indeed to upgrade. Even before we became chartered, our numbers reached an unprecedented 3,000 this year. The SfEP was first and foremost a community of members and the same will be true of the CIEP. At the end of the time covered by this report, in February 2020, we were starting to feel the effects of the pandemic on all our lives and, as a Council of directors, we have had to make difficult decisions about future events, asking the staff to work from home, closing the office and holding our own meetings online. In this climate of rising anxiety, it is clear that our forums and social media platforms provide not only regular professional support about editing and proofreading and running a business, but also an outlet for anxieties and a place to exchange advice on how to deal with potential loss of work and income. Thank you to all those who have contributed.

## Chartership

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### Gerard M-F Hill, chartership adviser

Having delivered the SfEP Petition, Charter and Bylaws to the Privy Council Office on 23 January 2019, all the members of the SfEP Council, including Sabine Citron (SC) and I, nervously waited for objections after the public notice appeared in the *London Gazette* on 11 April. There were none, and in the early evening of 10 July our petition was approved by The Queen in Council. We corrected layout and spacing on three sets of proofs before the documents were printed. We had been asked to wait with any announcement, but finally we were able to tell members our good news at the AGM on 14 September. A month later the vellum copy was validated by application of the Great Seal, and next day we collected it from the Crown Office. To simplify the transition, the SfEP Council brought the charter into force only on 1 March 2020.

This has been a long process. Indeed, I told Council at the start that it was likely to take four to five years, and so it has. Below are a few of the notable dates along the way.

#### 2014

- 16 April: GH suggests chartership project
- 30 June: Strategy Day meeting welcomes the idea

#### 2015

- 29 June: Professor Andy Friedman's presentation to Council, which backs the idea in principle

- 5 September: SC becomes chair and is committed to chartership; GH steps up work on research

#### 2016

- 3 March: GH and Christina Thomas meet Tracey Heyworth of the Department of Culture, Media and Sport
- 15 April: SfEP Council vote to pursue chartership
- 17 May: DCMS agrees to act as sponsor
- 10 September: GH steps down from Council and becomes chartership adviser
- 4 October: First meeting with Privy Council Office

#### 2017

- All year: Research; meetings
- 30 October: Letter of Intent submitted to Privy Council Office
- 11 December: Analysis of name options submitted to members for discussion

#### 2018

- All year: Meetings continue alongside drafting of documents
- 4 January: Letter of Intent officially accepted
- 28 July: SfEP Council approves draft Petition, Charter and Bylaws; work begins on Regulations

#### 2019

- 11 January: Members vote in an EGM 98.4% in favour of the draft documents
- 23 January: Petition, with draft Charter and Bylaws, submitted to the Privy Council
- 11 April: Petition gazetted (notice placed in the *London Gazette*, the government's journal of record)
- 10 July: The Queen in Council grants our Petition
- 14 October: Great Seal applied and charter issued; work begins on preparations for the changeover

#### 2020

- January/February: Final preparations for relaunch
- 1 March: Charter comes into force

Our Royal Charter gives us official recognition as the sole authority in our professional field, though we will need to work hard to gain equal recognition and respect in the publishing world and beyond. Chartership lifts our profession to a new level, and we will find it opens doors and brings opportunities. We are now better placed than ever to cooperate with other bodies in the public interest and build contacts with people in responsible positions who carry weight in their own professional world.

The SfEP was Norma Whitcombe's idea but, when asked about its future, she replied 'It's for the members to decide.' We did that enthusiastically

in January 2019 and, in the words of our charter, we are now self-governing as ‘one body corporate’. Together we represent the editorial profession, and it is up to us to ‘foster in the public interest high standards of editing’. We can all do our bit individually on social media or by ‘honourable professional practice’ and together by working to develop our profession. As part of that and to celebrate chartership, members can refer to the publication they were recently sent that shows *Why Editing Matters*.

## Community

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### Vanessa Plaister

The focus of the community remit in 2019/20 was on local groups, social media, and equality, diversity and inclusion (EDI) – newly added to the remit in 2018/19. Coordinator Abi Saffrey steered the SfEP blog, and my work as community director was dependent on the 80+ member volunteers who generously coordinate SfEP local groups and shape the SfEP’s social media.

#### Local groups

In 2019, two local groups hosted regional mini-conferences: North-East England (NEE), in May; Toronto, in November. Both exceeded expectations, with NEE a particular challenge for its organisers, who tested new procedures aiming to eliminate financial risk to member volunteers.

Other events organised by Dundee and Ely/Fenland also tested the framework, and new event guidelines are in progress at the time of writing.

We also saw two new local groups emerge in 2019/20:

- most recently, a group reaching into Norfolk (West/Central) – the established Norfolk group renamed Norfolk (East)
- most broadly, a new Cloud Club (East) – directly driven by the [EDI audit](#) (see later) in which some members asked that the SfEP virtual local group widen its global reach – the established Cloud Club renamed Cloud Club (West).

#### Social media

Under the joint leadership of community and marketing, the SfEP’s social media delivered

impressive outcomes in 2019/20, including cultivation of an approachable, knowledgeable and encouraging brand voice, as well as a renewed focus on reach and engagement.

Original and SfEP-oriented content joined curated content to excellent effect – an effect to be boosted in 2020 when we drive traffic towards a user-centred new website (see [Digital services](#) below).

The volunteers who deliver the SfEP’s social media are a collaborative team of dynamic and dedicated members without whom we could have no presence across Facebook, Twitter and LinkedIn.

When we recruited to that team at the end of 2019, we were thrilled with the response and able to select strong new contributors, who settled in swiftly. We gave unsuccessful members advice on boosting their experience – and we’re hopeful about the results when we recruit again in 2020.

#### Blog

Throughout 2019/20, the SfEP’s blog delivered engaging and insightful content, nominally under community leadership, but in truth thanks entirely to blog coordinator Abi Saffrey and the contributors whose creativity she harnessed.

In 2020/21, the blog will move out of the community remit and into that of the new information team that’s overhauling knowledge management within the CIEP (see [Information](#) below).

#### Equality, diversity and inclusion (EDI)

At the end of April 2019, we delivered an EDI audit to all members. The audit was well received. One member told us:

It’s such an excellent step for the SfEP to take. When I read your first email about it and when I did the survey, I felt so proud to be a member of the SfEP...

The audit closed on 1 May, with a remarkably high response rate of 41%.

While a report on the results remains delayed, the Council has seen summary data and I’ve regularly drawn on that data – including in comparison with national statistics and results from a similar industry-wide Publishers Association survey – to answer questions on eg in-house membership.

That data has also underpinned steps such as the introduction of pronoun stickers at the 2019 annual conference. Around half of those in attendance chose to use them: a remarkable take-up for something new and so unfamiliar to many. Not only will we offer them again at future conferences, but also the Toronto local group made Canada-specific versions available at its mini-conference, positive feedback evidencing the value of inclusion initiatives at even a local level.

The conference director has shared feedback on accessibility from the annual conference, and the community and conference remits will collaborate to do better in the future – notably for those with hearing impairments.

Finally, and perhaps most crucially this year from a community perspective, we delivered a conference-specific dignity policy for the first time in 2019. Expanding and revising it to reach beyond the conference, we then published ‘Participating with dignity in all SfEP events and activities: The SfEP Dignity Policy’ in early February after consultation with members.

All members are now bound by the [Dignity Policy](#) in the same way as they’re bound by the Code of Practice, and those using the member forums agreed to it under the forum terms of service. This gives us a strong foundation on which to build further initiatives, such as new forums within which members might feel supported to share their experiences and insights as editors of English as a second or other language, or as BAME editors.

What lies ahead is exciting.

## Conference

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### **Beth Hamer**

The 30th annual SfEP conference, and final one under the old name, was held at Conference Aston in Birmingham on 14–16 September 2019 with the theme ‘In the beginning was the word’. For the second year running, the conference attracted a record number of delegates – 190 in total, with 150 residential delegates – and was very well received, with an overall rating of 4.7 out of 5 (up from 4.5 in 2018, mainly due to the higher standard of facilities at Aston). Delegates scored the balance and variety

highly (4.6 out of 5) and were mostly happy with the accommodation (4.6 out of 5). All comments were noted and will be considered when planning future conferences. The 2019 conference had a surplus of £5,270.

New initiatives in 2019 included a conference app, which contained all of the information usually available in hard copy in the delegate folders. It was extremely popular with delegates, and we now plan to make future events paper-free (although we will still provide information on PDFs should delegates want to print hard copies themselves). I’m very grateful to Richard Hutchinson, the digital services director, for finding the best app and doing all the hard work (along with Shannon Humberstone) associated with making it such a success.

In 2019 we offered a quiet room for the first time as a space where delegates could go if they needed to get away from the bustle of the social areas. Several people used it and many commented that they were pleased it was available. We also provided pronoun stickers for delegates to display on their name badges and introduced a Dignity Policy, both of which were part of our drive to ensure that everyone attending any of our events is empowered to participate fully and positively. My thanks go to Vanessa Plaister, the community director, for her guidance in making inclusion a key part of the conference plans.

One area of concern at this year’s event was the issue of audibility in both session rooms and social areas. I have consulted with various people who experienced problems, and the conference team will prioritise putting measures in place to ensure that this issue is addressed in future years.

Preparations for the 2020 conference, which was due to take place at Kents Hill Park, Milton Keynes, from 12 to 14 September, began in earnest in January, with a planning meeting at the venue attended by conference team members Melanie Thompson and Jane Hammett. Booking was due to open on Thursday 19 March, but because of the worsening of the COVID-19 pandemic in the weeks running up to this, the Council took the decision to postpone by four weeks. When the shutdown of pubs, restaurants and entertainment venues was announced on 20 March followed by the lockdown measures

introduced on 23 March, the Council took the difficult decision to cancel the 2020 conference. There were several reasons for this:

- It was unfair to ask people to make a financial commitment to an event we didn't know with any certainty would be able to take place.
- As most of our members (and therefore conference delegates) are self-employed, they may be facing financially uncertain times.
- Speakers may not be willing in these uncertain times to commit to the event, or may cancel at a later date, meaning it would be difficult to guarantee a high-quality programme.

Kents Hill Park kindly agreed to waive the cancellation fee if we moved the conference to 2022, which we were happy to do.

While it's obviously hugely disappointing that we won't be able to hold our first physical conference as the CIEP this year, we are looking into options for a virtual conference later in the year.

The 2021 conference will be held from 11 to 13 September at the Golden Jubilee Conference Hotel in Glasgow, which offers excellent conference facilities and comfortable, well-equipped accommodation under one roof.

## Digital services

### Richard Hutchinson

First of all, you'll notice that during this year this directorial remit was renamed from 'internet' to 'digital services', reflecting the fact that all of the Society's activities, internal as well as external, are underpinned by digital technologies, and looking forward to future integration (see [New digital platform](#) below).

The ongoing operation of the main digital services we currently provide, the website and forums, continues (mostly) unnoticed in the background thanks to the sterling efforts of the web development team and the forum moderators; my thanks to all of them for their support and reliability.

### Website

Table 1 adds to the statistics published in previous years, and interestingly it shows that website traffic has declined slightly this year. Table 2 shows the distribution of page views across the different areas of the site, showing that those who do visit are generally looking for training or for information about joining, or are members looking for resources.

**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
2019/20	349,036	211,468	943,652	1,196,115	3.43

Some of the website content has been improved to add more pictures and videos, and to reduce the amount of text to wade through where that's possible. Additionally, work has been done in combination with the CIEP rebranding efforts to make sure that the website reflected the new brand once the charter came into effect.

### Forums

The forums continue to grow in membership and in member engagement. Table 3 shows how activity has increased over the last year. Work has also been undertaken to ready new branding for the forums in anticipation of chartership.

### Conference app

We introduced a conference app to support the 2019 conference. It was very well received, and we will continue to provide such a facility at future conferences. The app provides a full timetable (that can be customised to create your own personal itinerary), full details of all the sessions and speakers, including floor maps to help you find the appropriate room, and the ability to post messages and photos generally or to send them to other individual attendees.

Some random statistics concerning the way the app was used:

- 174 downloads, of which 51% were Android
- 13,074 individual sessions, with 10,689 menu launches
- 198 chat messages sent, 233 comments on posts and 1,148 connections made
- 339 session feedback surveys completed and 51 conference evaluation surveys completed.

### New digital platform

Early in the year the Council decided to review the Society's digital infrastructure, and to look at how, and how effectively, it was being used. A digital strategy was produced outlining the necessary requirements to support the Society's strategic aims. This then led on to a specification for a new digital platform to integrate as much as possible of the required infrastructure, to the benefit of the maintainers, administrators and users alike.

A market review was undertaken and a candidate solution demonstrated to the Council. It was decided to proceed with the YourMembership platform, and

work has continued since then to define how best to deploy their system to suit our needs, and how to migrate our data from the current system to the new one as smoothly as possible. This work is ongoing, and at some point in the coming year we will be transferring our operations to the new platform. For a little more on the platform and the rationale behind the move, see the article in Editing Matters.

**Table 2** Website areas accessed

Total page views: 1,196,115

Website area	Page views	
	Number	Percentage
/training/	294,184	24.59
/directory/	178,918	14.96
/resources/	169,120	14.14
/membership/	119,075	9.96
/ [home page]	116,766	9.76
/members/	86,897	7.26
/about/	77,041	6.44
/standards/	41,260	3.45
/networking/	36,424	3.05
/members	20,306	1.70
/training/	294,184	24.59

**Table 3** Forum usage

	May 2018	April 2019	April 2020
Total topics/threads	17,612	20,280	23,500
Total posts	156,050	182,947	216,232
Total users	2,080	2,326	3,076
Active users*	606	760	819
Users with at least 1 post	1,153	1,320	1,575
Users with at least 50 posts	289	323	359

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

## External relations

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### Lucy Metzger

At the time of writing, doing anything ‘external’ in person is ruled out; but until recently, our representatives were doing a wonderful job promoting our organisation, our community and our standards. Even mid-pandemic, so many of our colleagues are exploring ways to keep our relationships flourishing. I take my hat off to all our members who have worked hard and creatively to represent us so well, and I thank them.

### London Book Fair 2019

With the help of 22 volunteers, I ran the SfEP’s stand at the London Book Fair, 12–14 March 2019. Our experienced members provided great publicity and wisdom, and our newbies’ enthusiasm was infectious. We were in a busy area and had a good flow of interested people. We received useful feedback from authors and publishers, including enthusiasm for our Directory of Editorial Services.

### Publishing courses and their students

Our ambassadors have continued to meet with publishing and writing students, giving presentations and working through sample editorial exercises. This year we made repeat visits to University College London, the University of Plymouth and the University of Roehampton, and we visited the University of Derby for the first time. We’re exploring collaborations with Westminster University, Keele University and the University of Reading, and with the Solent Society for Proofreaders and Editors, a student organisation based at Solent University.

Many UK publishing courses cover the whole of publishing in one year, so students don’t spend much time doing hands-on editorial work – which, as it turns out, they are keen to do and really enjoy: often it is editorial work that first attracts them to publishing. Our ambassadors tend to be enthusiastically received and, of course, such visits allow them to promote the training, member benefits and community support that we offer.

### SfEP winners of Print Futures Awards

The Print Futures Awards scheme, sponsored by The Printing Charity, gives grants of up to £1,500 to people

aged 18–30 looking to join, and those already progressing in, our sector. At the ceremony in July, 6 of the 93 winners were SfEP members. Congratulations to all! They, and other winners, mentioned SfEP training courses among the uses to which they planned to put the award.

### Networking with other groups

This year our ambassadors visited, among others, the Frome Writers’ Collective and the Sutton Writers group. We are discussing visits to groups at Sheffield Central Library and to the Wimborne Literary Festival. I encourage our members to keep their eyes open for writers’ groups and upcoming literary events in their areas. We can always arrange for leaflets and publicity materials to be sent out, and we can also arrange for our members to visit. If you are interested in representing our organisation in any way, do get in touch with me!

Tutors at Oxford Brookes University, where we have sent ambassadors in the past, have expressed interest in their publishing students getting together with members of our Oxford local group. Again, I encourage other local groups to contact me if this appeals.

### Partner organisations and mutual support

We have a substantial history of cooperation with other organisations, beginning with our own origins as an offshoot of the Society of Indexers. We now share discounting arrangements – on membership, training and events – with more than a dozen like-minded professional organisations, in the UK and internationally. Most recently, I have explored links with the Society for Book and Magazine Editors of Nigeria, with Nordic Editors and Translators, and with the Indigenous Editors’ Association (Canada).

### Working with publishers and organisations that publish

Following a discussion at our 2019 AGM, Melanie Thompson offered to set up a committee to explore ways to attract as members more people who do editorial work in-house – whether for publishers, other businesses, government, or third-sector organisations – and to consult on new and better ways to serve in-house members. The committee is up and running. This is an area that we have long wanted to develop, and it’s exciting to see good progress.

### The hub: our office

Because all of these initiatives involve communication and administrative work, none of them would be possible without the help of our marvellous office staff. They respond promptly, effectively and cheerfully to all my requests for leaflets to be sent out, ambassador expenses to be reimbursed and discount codes to be set up; and they are quick to pick up on incoming messages that show promise for new networking and collaborative opportunities. I thank them.

## Finance

### Mark Robinson, financial adviser

The figures for the year ending 29 February 2020 show a surplus of £102,726, down from last year's figure but still healthy. The surplus for the year has increased the strength of the balance sheet, which now shows net assets of £777,489, up from £674,763 in 2018/19. The surplus this year is due to budget allocations not yet being spent, particularly the costs for chartership being less than the budgeted cost and the CIEP launch event being postponed.

The detailed income and expenses are shown in the accounts.

This year has seen a 17.1% income increase, from £593,409 last year to £695,011 this year. Income from membership subscriptions rose by £52,957 in the year thanks to many new joiners. Income from training has generated a similar surplus to last year, at £140,286 compared with £138,063 last year.

Administrative expenses have increased this year, due mainly to the work carried out to prepare for the transition to the CIEP, taking on an additional part-time person in the office and increased website costs.

The additional work undertaken by directors has increased their fees from £80,852 last year to £94,631 this year. The first 15 hours of each month and time spent at Council meetings by each director continue to be unpaid.

The Institute is in a healthy financial situation, which puts it in a strong position to face the unusual challenges of 2020/21 and to finance its plans for the future, including launching its new integrated digital platform and gradually moving to a different governance model.

The Figure 1 shows what subscriptions paid for in 2019/20.

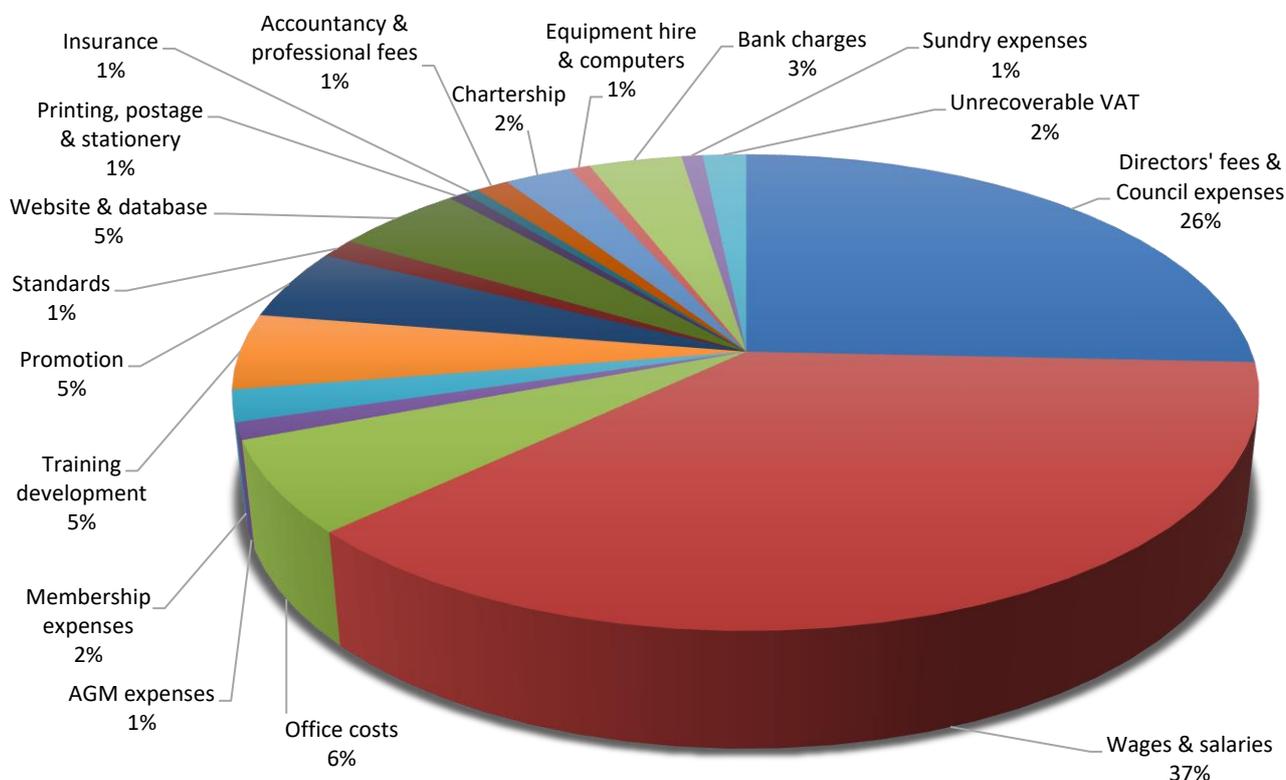


Figure 1 What your subscription pays for

## Information

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### Margaret Hunter

#### Publications and resources

We published two new guides, *Editing into Plain English* and *Editorial Project Management*, both of which have been selling well.

Subscriber numbers for our *Editorial Excellence* newsletter have continued to rise. Although this is aimed at non-members, to increase general awareness of editorial good practice, many members subscribe too, which suggests people find the content useful. The newsletter emails achieved an average open rate of 70%.

Nik Prowse took over as book reviews coordinator and has been doing a splendid job.

Hazel Reid once more delivered six excellent issues of the SfEP magazine, *Editing Matters (EM)*, with her editorial team of Rich Cutler and Rod Cuff and our regular column writers. Thanks to them all. The statistics from the emails sending the magazine to members showed an average download rate of 35% (but members could also download direct via the website, so we hope that more read it). If you didn't read issues when they were sent, remember members can access the full [archive](#) on our website.

As part of a complete review of our information strategy during preparations for chartership, we decided to refocus the budget (over half of which had till then been spent on the magazine alone) to produce a wider range of resources. The *EM* issued in February 2020 is the final in magazine format for now while we explore alternative formats.

In October 2019 we appointed two new information commissioning editors, Liz Jones and Cathy Tingle, and they were joined in January 2020 by Abi Saffrey. They make a great team and are working hard to plan, write and commission lots of exciting new information resources for members and others. We are looking forward to moving to our new digital platform website, when members will benefit from the full potential of our new information strategy, which aims to get more relevant information to a wider range of readers.

#### Website information improvements

Work continued to review, improve and rationalise the huge amount of information on the website, and

we did a major revamp of the section on upgrading. Priority time has, however, gone to chartership preparations, so there is still much to do. We'll continue to chip away at this huge task.

Meanwhile, we are now seeing the results of our previous efforts, with the introduction of an online/PDF handbook for new members instead of posted paper versions cutting stationery costs and crucially staff admin time considerably.

#### Member emails

We overhauled our email system to allow members to unsubscribe from certain mailings that do not interest them. We hope that provides the incentive to read those of our communications you enjoy when they land in your inbox.

#### Preparing to launch the CIEP

There has been an inordinate amount of work to do to rebrand as the CIEP. Many hours were spent by many people planning, consulting and discussing, and many more making the changes to a huge list of items, including logos, text mentions and descriptions, publications, admin templates, training materials, web pages, social media pages, marketing materials and so on. It's a testament to the good-heartedness of everyone involved that we managed to achieve the bulk of this before the official changeover. The residual work continues...

## Marketing

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### Denise Cowle

This has been a busy year as we prepared for the biggest marketing and public relations campaign in our history, to launch the new CIEP to the world.

#### Rebranding as the CIEP

At the core of marketing is our brand, so the marketing director was part of the Council subcommittee for rebranding as we moved from the SfEP to the CIEP. This involved working closely with our design agency, consulting focus groups and holding extensive discussions with the Council as we gradually focused in on a new brand that reflects our ethos, values and mission. We're delighted that the overwhelming response from members and non-members alike has been positive.

## 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. Members spoke at a variety of events around the country, including a well-attended seminar at the London Book Fair, and the Council is extremely grateful to them for their willingness and enthusiasm in flying the flag on our behalf.

We sponsored tickets for events that focused on improving accessibility to publishing as a career: a ticket for someone on means-tested benefits to attend the 'Get a Job in Publishing' conference in Manchester in April 2019, and two tickets for those who would otherwise be unable to afford to attend the Society for Young Publishers London 'Career Speed Dating' evening in June 2019.

## Videos and photography

September once again saw us filming at conference in Birmingham, and this year the focus was on getting footage to use for promoting specific training courses and CPD.

We again hired a professional photographer, and we continue to use the videos and photographs to make our website more attractive and to improve visibility and engagement on social media.

## The launch of the CIEP

We commissioned an external PR consultant to help us coordinate our PR campaign and create a media pack, in close consultation with the information team. A core part of the launch was the celebratory event to be held in London, which later had to be postponed because of COVID-19, and her focus was to generate media coverage of our chartership and attendance at the event. The media pack could also be used by the many local groups who were arranging events in their areas.

## Social media

We ran an intensive countdown campaign across all our social media platforms in the final week of February, leading up to our official launch as the CIEP on 1 March.

As ever, I'm hugely indebted to the social media team for their ongoing commitment and support. Social media is a cornerstone of our marketing, and our presence there is the public face of our organisation. Our volunteers do a fantastic job of conveying the professional yet friendly and humorous persona that we aim for.

Our membership continues to grow, and I've no doubt that the unofficial marketing that our members do when they speak so warmly and enthusiastically about being part of our organisation is a major factor. And for that I thank you all.

## Membership

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### Sue Browning

This year we saw membership numbers break the 3,000 mark, which feels like a milestone and reflects the hard work of our chartership, marketing and PR, and social media teams, in particular, who made strenuous efforts to increase our presence and visibility as we worked towards chartership. At the end of February 2020, we had 3,062 members (3,003 individual members, 34 Corporate Subscribers, 25 Retired Members). This is a net increase of 237 individual members, or 8.6%, a bigger increase than last year (when it was 5%), and a little more than the average increase since 2012/13 (the first year comparable figures were kept) of 7.5%.

We actually signed up a total of 1,070 new individual members (most at entry level). This compares with 979 in 2018/19 and an average of 750 per year since 2012/13. It is clear from these numbers that we lose a significant number of members every year, mostly at entry level. At 57%, this is by far our biggest membership category, and there is no doubt that many people join to take advantage of our discounted training and other benefits as they test the waters, and they find either that editing and proofreading is not for them or that it is not sustainable. When people do give reasons for leaving (and most don't),

economic and personal factors are most obvious; very few are dissatisfied with the organisation itself or the benefits membership brings.

We welcomed 16 new Corporate Subscribers this year, a mix of publishing-related and more general communications entities. This is another category where our annual turnover is high, with some joining to get discounts on training and then leaving the following year. We are aware that we need to understand this category of our members better, and some efforts have been made to discover what they would like from us so that we might improve what we offer.

Of the 67 members affected by our seven-year time limit this membership year, 20 (c.30%) upgraded (two leapt straight from ELM to APM). They were justifiably proud of their achievement and many indicated that they had been grateful for the nudge. Only one person who attempted to upgrade failed. Those who did not upgrade have now left the Society/Institute, but they may apply to join at PM as soon as they can demonstrate the necessary training and experience, or at ELM/IM after three years. These time limits were put in place in 2015 with the aim of encouraging members to upgrade, so it is interesting to note that the proportion of Professional members (PM+APM) to non-Professional members (ELM+IM) has remained constant at around a third. About 40% of the Professional category is APM, again a pretty steady figure since 2012/13.

Of course, membership is about more than numbers, and it has been pleasing to note the high levels of engagement on the forums and in local groups. Newbies in particular receive a warm welcome. We will also be reviewing our range of benefits, both general and grade-related, to support members at different stages in their editorial careers.

## Organisational

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### Martin Walker

This was my first full year as organisational director. The role exists largely behind the scenes in organising and minuting Council meetings. As will be clear from the rest of this report, it has been an exceptionally busy year, so getting through the Council business has taken directors a great deal of time. To help with this,

two of our Council meetings in the year were over two days, one in Birmingham and one in Glasgow.

There are two parts of the organisational director role that are more outward-facing towards the membership. The first is the AGM, which took place on 14 September 2019, before the annual conference. This was run in the traditional way, as it has been for many years, with 84 members attending and contributing. The second is Council News, which was boosted during the year to give more detailed information about Council discussions and decisions. The new format was well received by members, and was another step forward in engaging members more in the governance of the Society, now the Institute.

## Professional standards

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### Hugh Jackson

This has been another busy year in the professional standards remit. Much of this year, as in other departments, has been dedicated to urgent preparations for chartership, and this has inevitably taken precedence over delivery of some of the other important projects. Renewed focus on those projects will be the theme of the coming year.

Following the 2019 AGM, the standards and professional development remits merged. This will prove useful in coordinating some of the next tasks.

### Upgrades

The number of people who apply to upgrade is increasing every year, and this year has been especially active. The final two months of this year have been, by some way, the two busiest months for upgrades since at least 2016. Our thanks go to the office staff and the anonymous members of the Admissions Panel, who work exceptionally hard to process applications fairly and quickly.

In the year from March 2019 to February 2020, 280 upgrade applications were made (up 21% from the previous year): see Figure 2 on the next page. From these applications, 99 members were awarded Intermediate membership, 92 Professional membership and 27 Advanced Professional membership (the remainder were either unsuccessful or in progress at the end of the year).

Additional support will be given to members over the coming year to help them prepare to upgrade their membership. This is likely to include a dedicated development portal in the new website where members can log their training and experience as they go. Members can always email the [professional standards director](#) with any queries about upgrading and development.

The information team has simplified and improved the upgrading pages of the website, which has received positive feedback.

### Tests

By 28 February 2020, 291 people had taken the basic editorial test, of whom 206 (70.8%) had passed, giving an overall pass rate of marginally over 70%, which is right on target. It is encouraging that the number of people taking the test is increasing, but even so only a small proportion of members have taken it. If you have not taken it, please consider doing so. A revised syllabus was introduced this year and this will be further improved in the coming year.

The Council has approved a prize for the best test score. The fine details of this are still to be confirmed but it is hoped that this will be awarded at the time of the AGM.

### Code of Practice and other standards policies

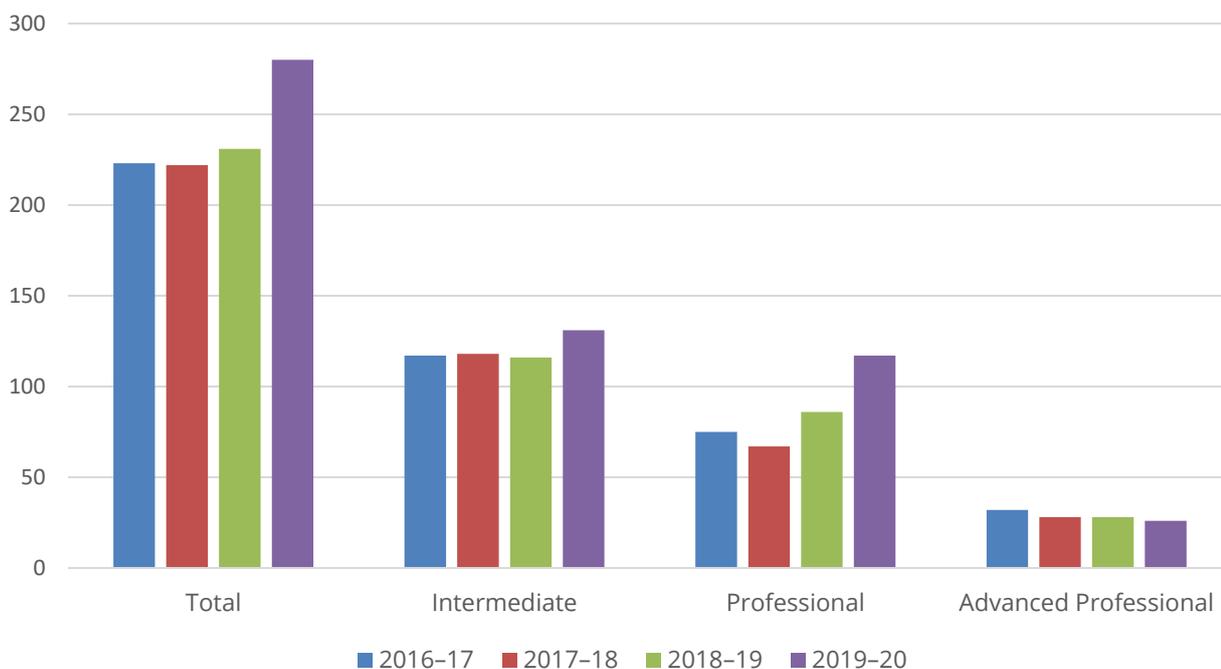
The Code of Practice has served the SfEP well for many years, but it is time to revisit it in light of our increased professional status. Members will be invited to contribute to a consultation on developing the Code of Practice so that it serves our needs for the years to come.

Much work has been done in the run-up to chartership to prepare important new governance documents, which were circulated among members at the time that the CIEP came into being.

### New standards

With chartership comes increased responsibility to the public to ensure that all of our members are providing the highest possible standard of service. For this, we are working on several new projects.

For new Entry-Level Members, there will be an entry test of English-language proficiency. If membership is to be meaningful, it is vital that we are able to demonstrate that we are proficient in the skills needed to be excellent editors. At Intermediate level and above, this is shown through our robust and well-regarded upgrade structure. However, at entry level, the only entry



**Figure 2** Annual upgrade applications: total and by grade requested

requirement is the ability to pay the membership fee. Since this level of membership is crucial for people who are new to the profession, it will be a test not of editing knowledge but of command of the English language.

At the other end of the scale, for our more advanced members, a CPD programme is being drawn up, which will focus on helping people to plan and carry out their training and other development systematically. As a profession, we are outliers in not requiring our members to maintain their CPD: over 90% of professional bodies have a CPD programme. We have to look at how to institute this in a way that is fair, cost-effective and effective in supporting our businesses.

For members who work with students, a dedicated code of practice continues to be in progress. This has been delayed by chartership preparations but is well developed and we hope to be able to announce more soon.

For proofreaders, best-practice guidelines for PDF markup have been proposed and will be worked on soon.

## Training and mentoring

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### Jane Moody

#### Online courses

During 2019/20, the numbers registering for online courses have continued to rise. As always, proofreading courses are the most popular, with Proofreading 1: Introduction being the leader.

Plain English for Editors was launched to universal acclaim. This course was developed by Luke Finley and Laura Ripper, and is already proving to be popular. The course explains what plain English is, provides the skills to use guidelines on plain-English editing with thought and care, and helps users to think through how to market their services and deal with challenges.

#### Workshops

Three Proofreading 1: Introduction and one Copyediting 1: Introduction workshops were run

this year. The demand for these face-to-face workshops is low but steady, so we will continue to offer them for the foreseeable future. It remains possible for any local group to request a workshop to be run in their area.

#### In-house courses

We ran several tailored workshops for other organisations and companies in 2019/20, including one which offered a final assessed exercise and pass certificates. These courses are based on our standard courses but usually use materials supplied by the company. Courses may be off-the-peg or can be adapted to suit the company's needs. This year, copyediting and grammar were the most popular topics.

#### Webinars

This year, we experimented with a course presented as a series of three live webinars. PDF Markup was tutored by Sarah Price, assisted by me, to an audience of around 45 people for each session. This was a new experience for the tutors and for most of the audience, and while there were a few teething problems it proved to be successful and is a delivery method that we will repeat in the future.

#### Mentoring

Mentoring numbers continue to be lower than we would like. As this is a one-to-one learning experience, it 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.

#### Tutor development

This year, for the first time, a day-long workshop for tutors was held on the Saturday of conference, to which all tutors and mentors were invited. An external speaker, Professor Sally Jordan from the Open University, gave an excellent presentation on giving and receiving effective feedback. Tutors also discussed the proposed curriculum for training, the marking scheme for assessed courses, how to redevelop the mentoring scheme and delivering bespoke courses. This will now be an annual CPD event for tutors.

### **Exercise bank**

During the year, I began development of a bank of practice exercises in proofreading, copyediting and grammar, which will be available for sale on an exercise-by-exercise basis for members. Several members have already submitted exercises but many more are needed. These are real pieces of work for which we have

requested and received permission from the publisher and/or author to use. Each exercise is accompanied by a full brief, a model answer and a commentary. The aim is to give members additional practice to support the learning in our main training courses. If you are a PM or APM and would like to submit an exercise, please contact the [training director](#).