



Chartered
Institute of
Editing and
Proofreading

Annual report

2021/22

Pre-approval version for
consideration at the CIEP AGM



Chartered
Institute of
Editing and
Proofreading

This report covers the activities of the Chartered Institute of Editing and Proofreading (CIEP) and its Council from 1 March 2021 to 28 February 2022, the Institute's financial year. It does not cover the activity of the Institute from 1 March 2022 to the publication of this report in June 2022, in preparation for its annual general meeting (AGM). The CIEP was launched on 1 March 2020 and this is our second report.

ciep.uk

Contents

Chair	1
Communications	3
Community	5
Conference	7
Digital services	9
Equality, diversity and inclusion (EDI)	11
Finance	13
Information	14
Marketing	15
Membership	17
Organisational	18
Professional standards	19
Special projects	21
Training	23



Chair

Hugh Jackson

I am, finally, daring to dream of an end to the gloom of the last two years. For all the loss, the fear and the dashed hopes, we can now at last see the first dividends of our strained but unbroken faith that time will heal. Whatever economic and political difficulty lies ahead, every member who has navigated their business or job through the turbulent waters of these last years has managed something extraordinary. We are proud that the Institute has been a part of your story.

Getting together again

We've been kept apart for too long. It's been two years since local groups met in person and even longer since our last in-person conference. This year has not been the time to remedy that, but it's not far away. I look forward to seeing you all at conference in September, and I hope that we'll be meeting in our local groups very soon.

Even without being physically in the same place, our community has thrived this year. The forums are busier than ever, and a number of special interest groups are established or planned, which will help to spread expert knowledge on particular areas of editing. The Institute's guides are now completely free to all members, and our training offering is ever expanding. Being a member of the CIEP is a mark of editorial quality around the world, and I hope you're as proud of being a member as I am.

The Council and the office

The CIEP office is the centre of all our operations. This year, we said our fond farewells to two members of CIEP staff: Natalia Lusty and Betty Doyle. Office manager Shannon Humberstone was joined in the office by

Matthew Ridley, as administrative assistant. By the time this report is published, we expect to have also announced the appointment of a membership manager: a vital expansion of office capacity and expertise. We're working on plans to develop our office team further.

There have been changes on the Council too, and we're fortunate to draw on such remarkable talent. Louise Harnby has moved to become the communications director, an exciting development she explains below (see **Communications**). When Margaret Hunter and Martin Walker stepped back from Council at the 2021 AGM, leaving with our very best wishes, Abi Saffrey and John Ingamells were elected; they are making the information and community remits, respectively, their homes. Vanessa Plaister became a special projects director, driving forward many of our grandest plans.

Strategy development and governance reform

For the Council, the last year has brought change, promise and achievement, as this report shows, though there never seems to be enough time to accomplish all that we hope to do. While the Institute is financially sound, director time is a scarce resource, so we need to make sure that we're exerting our efforts in the right direction.

It's been several years since our organisation last had a comprehensive review of our strategy – where we're heading and how we get there – and it's high time for another. We're currently working through that with external consultants, and we hope to be able to tell members something further soon. This is not cheap but, as the Council professionalises to meet the needs of a changing membership and world, we have to be realistic about what we're able to do for ourselves.

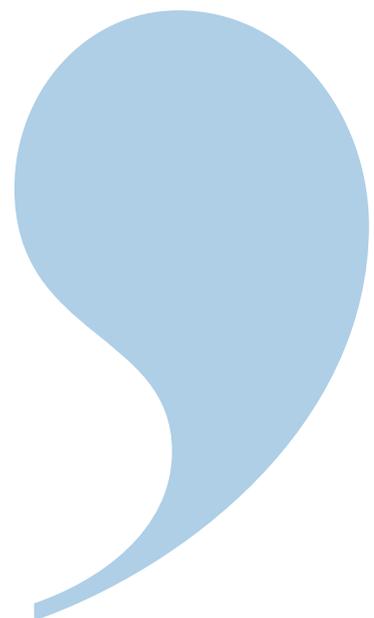
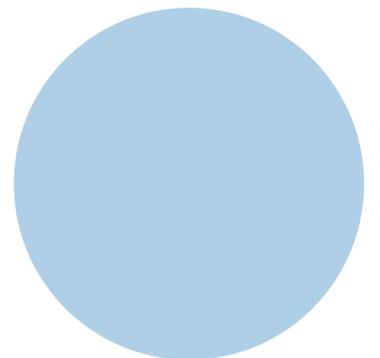
One area of development is governance reform. The 12 directors who serve on the Council each volunteer 12 hours a month and are paid for their time if they need to work more than that. Over the decades, the amount of work that the Council needs to do has increased dramatically, which is both demanding on individual directors and costly for the Institute. This year, collectively, the Council worked for nearly 4,500 hours, of which nearly 2,000 – the equivalent of over £68,000 – were volunteered. That's an enormous commitment, on top of directors' existing businesses. The remainder of the time, which is paid, cost the Institute over £86,000. Both of these sums of money are too high. The CIEP's Remuneration Committee, an independent panel of members that meets each year to advise the Council and approve the fees that the Institute pays, recommended reducing the number of hours per month that directors volunteer, and this change came into effect at the 2021 AGM.

Reforming the governance structure, and reducing the work that directors do, is vital to managing costs, but it's also important to recruiting and retaining talented directors who have the time to do the strategic thinking – the *directing* – that the Institute needs. We're currently exploring, with outside help, concrete steps we can take to reform our governance.

The coming year

There's never been a better time to be a member of the Institute, and this report is a testament to the hard work of the directors, staff and volunteers – and, not least, every single member. Thank you.

chair@ciep.uk





Communications

Louise Harnby

Communications is a new remit that morphed out of a desire to increase transparency about the Council's work. Discussions began in May 2021, and the remit was formalised in June of that same year. In the months that followed, we used that directorial space to revamp Council News, strengthen the CIEP's brand identity across all our messaging, streamline the delivery of Announces and improve how directors communicate with each other.

The communications strategy

The communications strategy, while new in name, was built upon three long-held key goals: to improve the Council's accountability and transparency in relation to members, to protect the Institute's brand identity and to promote its values. I'm pleased with how far we've come, though I recognise that we can do better.



Overhauling Council News

Using Council News as a vehicle for informing members about what the directors are working on is core to the communications strategy. I focused on creating a revamped Council News – one that's now archived on the website as well as delivered to members by email.

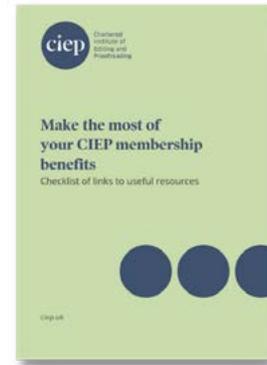
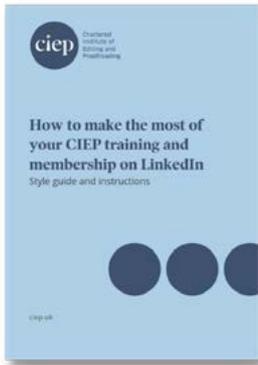
We started with the very best of intentions! However, capacity pressures meant that we lost our way somewhat. Consequently, the newsletter shifted into a space that tended to over-report on what we'd *done*, while under-reporting on what we were *doing*.

A gentle nudge from some of our members helped us rectify that and recommit to centring our progress. I'm very grateful for that accountability tap on the shoulder, and I believe that Council News is now delivering what we originally promised.

We've introduced the agendas of Council meetings, as well as a list of what's bubbling. It's a powerful reminder of the volume of work directors undertake, the variety of tasks that we have the opportunity to engage with regardless of remit, and why it's critical that we continue to build our subcontractor teams and staff, and review and develop our governance structure.

Communicating brand identity

Much work has gone into delivering a more consistent tone across CIEP communications, and so while we respect individual author voice in our guides, fact sheets, focus papers and blog posts, we've streamlined how CIEP-authored documents are checked and produced. All web copy and comms are now checked for tone before they're published, so that we're presenting a more coherent Institute voice that's warm, readable and informative.



The CIEP style guide also assists with this coherency, and I've worked with several directors to update this resource with our current preferences and fresh guidance on conscious language.

Communicating brand values and solutions

I collaborated with other directors to develop and deliver resources and web spaces that provide solutions to members' problems and promote the CIEP's values.

The changes made to the members' area of the website made our most valuable content more accessible, and we've created additional online spaces and tools that support members' business development.

Several new booklets dedicated to publishing opportunities for freelancers from under-represented backgrounds, support mechanisms for members in need and advertising CIEP training on LinkedIn, and a more general resources checklist, proved particularly popular.

As for the website, the **Environmental values** and **Equality, diversity and inclusion** pages are two examples of knowledge-based content that not only supports our members but also communicates where we stand to the world beyond.

This kind of external relations work is particularly valuable to the CIEP because it's findable in the search engines. That makes sense in a world where there's no bigger PR platform than Google.

This values-centred messaging – like the resources published by the information team – is promoted

regularly by the social media team working under the marketing director.

How directors communicate with each other

Good communications isn't just about member accountability; it's about internal Council accountability too. For that reason, all directors agreed to create remit-specific operational notes that we can use if a colleague needs to step back or down from Council (see also **Special projects**).

For some, that's required a huge amount of work, and I'm grateful to my colleagues for stepping up to the challenge. Its completion will be a tremendous step forward – one that mitigates business risk and helps us pave the way forward for a more holistic style of governance.

Improving efficiency with team-building

Like many of the Council's directors, I was keen to increase efficiency by building a support team. In November 2021, Steph Morgan and Penny O'Shea joined as internal communications editors (ICEs), and I'm thrilled with how quickly they settled in and took ownership of their roles.

It's them we have to thank for ensuring that the Council's official announcements are delivered in an engaging format to your email inboxes. This technical, quality-control work is time-consuming, and bringing the ICEs on board has allowed me to focus more on content and strategy.

communications@ciep.uk



Community

Vanessa Plaister and John Ingamells

By March 2021, many of the CIEP's local groups had settled into a routine of meeting regularly online, with diversified participation. At the end of February 2022 – two years on from their suspension – in-person local group activities were looking likely to resume

Broadening our horizons

A year into the pandemic, Zoom meetings were a familiar fixture in the CIEP calendar of events. More than half of the 40 local groups active in person in March 2020 met online during 2021/22, and long-standing remote groups Cloud Club (East) and Cloud Club (West) welcomed ever more members as international membership grew (see **Membership**).

In early 2021, the first of the CIEP's special interest groups (SIGs) had been born; as the year went on, the Fiction SIG found its feet, hosting not only regular themed meetings but also a book club centring the craft of fiction. It was a model with obvious appeal, and the Toronto local group quickly picked up the book club baton.

Early in 2022, two further SIGs evolved from specialist member forums: the English Language Teaching (ELT) and Legal groups. Both planned agenda-driven meetings on specific topics, and

members were eager to meet and talk to those with whom they'd long exchanged posts.

At the end of March 2022, a Music SIG made plans to meet: the fourth such group.

These activities remain possible only because of member volunteers who deliver CIEP policy and best practices at the helm of what is a core CIEP benefit. Here, too, Zoom has had an effect, allowing the community director to meet with incoming coordinators. There were no fewer than 12 in the period – many replacing coordinators of long standing, all of whom we thank for making the most of their membership by getting involved.

Measuring our success

Taking non-members out of local groups, the **CIEP discovery meetings** went from strength to strength in their second year. Some 91 prospective members attended 10 meetings during 2021/22, allowing us to capture a 53% conversion rate, demonstrating how effective this targeted offering has proven to be.

Similarly, hosting meetings on Zoom has allowed us to capture members' sustained commitment to meetings – something worth monitoring when in-person meetings resume, so that we can target continuous improvement (see table below).

Year	Month	No. of meetings	No. of participants	No. of participants per meeting	
2021	March	(30) est	(303) est	(10)	
	April	30	328	10	
	May	37	343	9	
	June	31	272	8	
	July	26	267	10	
	August	20	156	7	
	September	34	320	9	
	October	30	316	10	
	November	27	337	12	
	December	30	303	10	
	2022	January	36	400	11
		February	27	299	11
Totals		358	3,644	10 (average)	

A short survey of members in 2021 added valuable commentary on the barriers Zoom had dismantled (including with its closed captioning) and other positive effects:

One of the upsides of the pandemic for me has been being able to attend the ... meetings regularly and really feeling part of the group ...

[W]hen we used to meet [in person] I could only just about have a conversation with the people sitting either side of me. As well as being able to hear everybody, Zoom is also much more inclusive in that it allows a group conversation between everybody, not just twos or threes. ... I hope the Zoom meetings continue.

Changing places

In April 2021, Vanessa revealed to the membership that she'd be relocating from the UK to Canada later in the year. With international membership at 20% and growing, the Council was keen to trial practising governance with an overseas director – not least because the test would be decoupled from the steep learning curve of any new director. The Council consulted with the membership accordingly and the membership agreed.

When John was elected to the Council at the 2021 AGM, a match between his skills and the needs of the community remit was evident, and Vanessa stepped to the side (see also **Special projects**).

John has brought a new perspective to the role, and his experience as a forum moderator fuelled possibility for the Council, which had long debated how best to manage the increasingly complex demands of forum moderation.

Focusing on the forums

The CIEP's online forums continue to be the beating heart of the Institute – the one place where all members can come together to share insights, ideas and advice on all aspects of their work.

It's fair to say that they have really come into their own during the difficult years of the pandemic, and it's also true that as the CIEP has professionalised – most especially, as the Council has come to recognise its responsibilities to members engaging in CIEP spaces – moderation of the forums has increasingly moved beyond the technical into the substantive and ethical.

With that, the role of and demands on the forum moderators – themselves members – have changed. The forums' technical management has long been – and remains – the responsibility of the digital services director, but the Council had become ever more alert to the need to support the moderators pastorally – that is, holistically and professionally.

When John joined the Council, the fog cleared, and he lost no time forming a Moderators Working Group, aiming to explore their needs and devise solutions.

As the year drew to a close, the Council agreed a reward/remuneration structure for volunteers and contributors across the CIEP (see **Special projects**), and John fixed his sights on recruitment to the moderation team. The five volunteers of March 2021 were now only four, and with two of those four also members of the Council, it was clear that this would be among the most critical of opportunities for members to get involved in in 2022.

As the year ends, then, long-promised community projects are near completion (eg handbooks for group coordinators), work with the EDI remit put on hold during the pandemic is again a priority (eg an accessibility framework) and forum moderation is sharply in focus.

community@ciep.uk



Conference

Beth Hamer

The CIEP Council made the decision in November 2020 to hold the 2021 conference as an online-only event, giving us ample time to reflect on what we'd learned from our first experience of an online conference and to make enhancements where possible. As ever, feedback and suggestions from delegates proved an invaluable source of learning and gave rise to several new initiatives, as detailed below.

Our platforms of choice

We decided early on to keep Zoom as the main platform for webinars and more formal networking sessions, as it had worked well in 2020 and remains the market leader. Following a suggestion from a member, we also decided to try a new platform, Wonder, to allow delegates to network and meet in a more casual space, rather like the coffee bar at an in-person event.

Networking success

The themed networking had been a huge hit in 2020, so we brought it back in 2021, and we also included an extra speed networking session the evening before the conference to act as an ice-breaker.

The Wonder room was something of a mixed bag. Some delegates loved it and appreciated the opportunity to 'bump into' people, but others either couldn't access it or found it difficult to navigate. Overall, it was worth trying, and I think the benefits outweighed the drawbacks, particularly for those who were able to engage with it fully.

Strong attendance levels

We were very pleased that our second online conference attracted almost as many delegates as the first (370 compared with 380 in 2020), particularly as we'd made a conscious decision to increase the cost of attendance to bring it more in line with other similar online events. The previous record for an in-person conference is 190 delegates, so the online format has continued to make it accessible to a wider pool of editorial professionals, and, once again, people attended from all over the world. It was notable that many delegates didn't watch the sessions as they happened but instead chose to wait for the recordings, which were available for three months after the conference. This was likely due to time differences and other commitments, but it again shows the value of online in expanding the number of people who can benefit from what the conference offers.

Session streaming

One of the main changes from 2020 was the addition of a second stream of sessions running in parallel in two of the slots each day. This meant we were able to offer more specialist subjects such as medical communications and fiction editing, along with broader subjects in the plenary sessions such as marketing and conscious and inclusive editing.

How attendees used the conference app

The conference app, via Guidebook, gave delegates all the information they needed about the conference in one place, including links to sessions, FAQs, contact details for enquiries, and details

of the schedule, sessions and speakers. There were 183 downloads of the app, 428 connections between delegates and 145 chat messages sent. I'm grateful to Richard Hutchinson and Owen Gregory for populating the app and keeping it up to date throughout.

The conference team

The conference volunteers – Ben Dare and Janet MacMillan – were invaluable in helping to plan the programme and in hosting sessions when two were happening at once. They also hosted the themed networking sessions and provided much-needed support throughout the conference, for which I'm very grateful.

Aiding accessibility

To make the sessions as accessible as possible, closed captions were available for all of the webinars and were also included in the recordings. We also took care to record in gallery rather than speaker view, so the sessions were easier to watch back, with no switching between speakers. The closed captions were auto-generated by Zoom, so it's fair to say they weren't always a truly accurate record of what was said, particularly for speakers with accents the software was unfamiliar with. We're looking into other options for closed captions for 2022.

The delegate experience

Delegate feedback from the conference was very positive, with an overall rating of 4.7 out of 5; session quality, 4.6; value for money, 4.6; and networking opportunities, 4.4. Delegates also gave a lot of helpful suggestions, which we'll use to enhance the event in 2022.

Awards finalist

In November, we entered the UK Association Awards in the best online conference category, and were delighted to be shortlisted as a finalist. The award ceremony took place (via Zoom, naturally) on 15 December, and although we didn't win (congratulations to the Royal Microscopical Society for taking the crown), we were pleased that the high quality of our online event was recognised by our peers.

Plans for 2022

At the time of writing (April 2022), we're planning for a hybrid conference in 2022, taking place both online and in person at Kents Hill Park, Milton Keynes, from 10 to 12 September. We're currently working hard to ensure that all delegates, no matter how they attend, have a fulfilling learning, networking and social experience, and that we can continue to make the conference a welcoming and inclusive space for all.

conference@ciep.uk





Digital services

Richard Hutchinson

The digital services remit involves supporting day-to-day operations covering both outward-facing aspects like the website and forums, and behind-the-scenes support for the work of the Council, staff and various teams who are helping to keep the Institute moving forward. The latter involves managing file-sharing (something we're now doing in a more organised way for efficiency and resilience), email and internal forums, and updating all these to handle changes in directors, staff and volunteers as required. We also have to find time to plan for, and work towards, our digital future.

Business as usual

The website needs constant attention, not only with new content and additional resources to make available, but with support for renewals, conference and AGM, annual pricing reviews, director changeover and more. One important initiative this year was the Exercise Bank, and an initial 19 exercises were packaged and made available for download and purchase.

On the conference front, we were able to bring back the conference app to help people plan and navigate their conference experience. We intend to do the same at the 2022 conference in support of our first hybrid event.

There is rarely a quiet day here at Digital Services Towers, and along with user queries and people reporting mistakes or omissions in content (always welcome, by the way, and inevitable when your core market is editors and proofreaders) there are occasional larger operational issues that demand attention. Email handling can be a lot more complicated than might be expected, and, with the help of our reliable internet service provider, we've had to work around issues with SSL certificates and

with handling spam emails. The latter is an ongoing problem because a number of our teams, and all the sfep.net addresses, use mail forwarding. If an email is detected or explicitly marked as spam at the receiving end, this has a negative effect on the reputation of our email server, which can then lead to problems when we try to send legitimate emails from our CIEP addresses. If this becomes more of a problem, we'll have to review how we implement the email addresses.

One particular issue was the recent advent of more secure online payment protocols, which necessitated updating the templates that govern the behaviour of our payment pages; a moderate amount of XSLT hacking and organisational toing and froing was required before everything was sorted out.

Looking to the future

The implementation of our new digital platform based on the YourMembership system continues, albeit slowly. We decided to make sure that it's done right rather than done quickly, but it's still proceeding more slowly than hoped. One significant addition to the system is our new Learning Centre, which provides a centralised way of searching all our various resources by topic and/or keywords (see the figure on the next page for the current dynamically built topic list).

We've also had to spend time evaluating possible replacements for our training platform. We've decided to use Crowd Wisdom, from the same stable as YourMembership, which gives us all the functionality we need and more, and which will integrate seamlessly with the main website once both are up and running.

digitalservices@ciep.uk



Choose the type of resource(s) you're looking for ...

- All
- Course
- Guide
- Factsheet
- Group
- Focus
- Webpage
- Advice
- Tool
- Blog
- Video

Now filter by topic ...

- Academic and student
- Arts
- Business practice
- Business resilience
- Businesses and organisations
- Copyediting
- Editorial judgement
- Education
- Equipment
- Ethical practice
- Fiction
- Grammar and usage
- Humanities
- Legal issues and permissions
- Marketing
- Markup tasks and methods
- Money and tax
- Pricing and quoting
- Proofreading
- Publishing
- Queries and communications
- References and citations
- Scientific, technical and medical
- Self-publishing
- Software
- Style decisions
- Terms and contracts
- Time management
- Tools and resources
- Training and CPD
- Wellbeing

... or search by keywords:

SEARCH

Reset

18 Business, 41 Editorial, 12 Specialist records found





Equality, diversity and inclusion (EDI)

Luke Finley

Commitment to EDI is a journey, not a destination: it's not an area of work where you can ever say, 'That's that fixed.' But as we continue to make EDI values central to how the CIEP functions, I've been hugely encouraged by the number of members (and non-members) who contact me to say how pleased they are to see the visibility and centrality of that commitment. For a not insignificant number of people, it's what persuades them that CIEP membership is definitely worth paying for.

Anti-racism work

I spent much of 2021 working with ChangeMakers UnLtd, an anti-racism learning and development consultancy led by women of colour, along with the CIEP's Anti-Racism Working Group (ARWG) – the diverse group of members who volunteer their time to help steer and develop our approach.

ChangeMakers ran a number of focus groups with members, directors and staff in early 2021. That work identified that there was a lot of enthusiasm for and commitment to the idea that the CIEP should be an anti-racist organisation, but that we weren't always on the same page about what we meant by that or confident about how to put it into practice. ChangeMakers went on to plan and deliver two training sessions for directors and ARWG members that significantly helped us to overcome these barriers. That better shared understanding and greater confidence was demonstrated during the year in a number of visible ways:

- We put out a joint ARWG–Council statement in the wake of criticism of Kate Clanchy's book *Some Kids I Taught and What They Taught Me*, condemning the racist, sexist and other abuse directed at several women of colour who'd been prominent among the critics. This in turn led to us making connections and joining partnerships with others in the publishing

industry keen to see the big cultural and practical changes needed to bring about a more inclusive, diverse sector.

- We've taken a more robust approach to moderating the CIEP forums on the rare occasions when discussions become conflictual and there's a risk of harm, particularly to members from marginalised or minoritised backgrounds. Members have told us explicitly that this approach has been central to their feeling that the forums are a safe place in which all members are welcome.
- We recently put out a statement in solidarity with fellow professionals in Ukraine. While this is more loosely connected to EDI, it's a reflection of the desire of the Council and a large proportion of our membership to be part of an organisation that's led by its values.

ChangeMakers' work has now finished, and the organisation has submitted a final report to us with recommendations for future action. The ARWG and I have used this as the basis for an anti-racism action plan, which will be shared more widely as soon as the Council has had an opportunity to discuss and shape it too.

Another significant piece of work supported by ChangeMakers got under way in March 2022, when we circulated a survey to the membership asking about experiences of racism, either in the CIEP or in the wider profession. The aim of this is to build on existing evidence that some minoritised ethnic groups experience disproportionate exclusion and marginalisation in publishing contexts, to find out to what extent that is reflected in our own members' experiences. It's a valuable way of gaining some qualitative, indicative data, particularly as our 2019 EDI audit was not able (because of our international membership) to ask some of the questions on race and ethnicity that might have given us more quantitative data in this area. The survey closed at the end of March and will be analysed in due course.

Dignity Policy

Last year, I mentioned plans to produce a handbook and flowchart to make the process of handling Dignity Policy complaints easier for all involved. Although it took a while to get going (largely because I needed the experience of having dealt with a couple of complaints myself before I could do it justice), it is now under way. The guidance will consist of a simple outline of procedure in flowchart form, accompanied by template letters and other documents for every stage of the process. This will greatly streamline the way we work when a complaint is received, standardising and simplifying the work of panels assessing any formal complaint and ensuring consistent and fair outcomes for both the complainant and the subject of the complaint in all cases. The protections offered by the Dignity Policy are essential in a modern organisation, but they can be time-consuming and are often, unsurprisingly, stressful for all parties involved in a complaint process. These improvements will reduce the time burden and secure members' confidence in the process.

Subsidised conference places in 2021

For the 2021 CIEP conference, we successfully ran a modest award scheme offering 10 free conference places to members who might not otherwise have been able to attend. We asked applicants for a brief statement about their barriers to attendance (cost, mobility, geography, etc) and how a conference place would benefit them in their development as editors. I appointed three CIEP members with some relevant knowledge and experience as an awards panel, and they judged which 10 of the 38 anonymised applicants made the best case.

This was an EDI 'quick win' – particularly at a time when the conference was fully online due to the pandemic, meaning that costs were lower and some of the barriers to attending an in-person conference were already removed. We will use the experience to inform future ways of widening participation in our annual conference and other CIEP activities.

EDI web page and resources

The CIEP now has a dedicated **EDI section on its website**, linking to a wide range of resources – a growing number of which we produced ourselves. This work is a wholly collaborative effort, relying

not just on the EDI director but at least as much on the information, communications and marketing directors and the staff teams supporting them, on our web team, and of course on the people who write the fact sheets or record the webinars. Among the resources we've added over the last year are a booklet listing publishing opportunities aimed at freelancers from under-represented backgrounds, another booklet providing details of hardship funds and other types of support for editors experiencing financial difficulties, and a guide to editing fiction containing gender-neutral pronouns. A key resource in development through the ARWG is a 'racial literacy' glossary that will sit alongside the glossary of environmental terms already developed by the Environmental Policy Working Group. We're also planning a half-hour webinar introducing the concepts of conscious and inclusive language and editing, which will be made available free to all members and promoted particularly to new joiners.

Widening participation and representation

As I said in last year's annual report, widened participation and broader representation should be core priorities for the CIEP, at all levels of involvement in the Institute's activities, from feeling comfortable posting on the forums to standing for election to the Council at our AGM.

It's hard to measure, but we believe that our more visible commitment to EDI over the last few years has already made a difference to members' participation in the forums and in CIEP spaces such as the annual conference – and I've heard from some who've explicitly said it influenced their willingness to get involved.

I'm always keen to hear from anyone on this subject, whether you want to get more involved yourself or have ideas about what we should be doing to help others do so. I'm also conscious that I've often prioritised race and ethnicity in my tenure so far – for justifiable reasons, in my view – but that doesn't mean we don't need and want to see comparable work in relation to disability, age, gender or any other aspect of EDI.

edi@ciep.uk



Finance

Mark Robinson

I'm pleased to report that the financial statements for the second year of trading as the CIEP, ending 28 February 2022, show a healthy position. It has been significantly better than the position anticipated when the budget was set, back in January 2021, with income over £25,000 higher and expenses over £100,000 lower than anticipated.

You'll see from the accounts that the surplus is £308,727, which takes the Institute's total assets less liabilities to £1.3m.

Income

Subscription income has increased from £437,784 in 2020/21 to £465,852 this year, representing a growth of 6.4%.

Training continues to be very popular, with income at £293,869, slightly lower than last year's figure of £297,736. However, training continues to contribute to the surplus, and the contribution figure for this year is £181,537, compared with £136,680 in 2020/21.

The conference was extremely successful in 2021, generating an income of £35,083 and a surplus of £24,903 (in 2020, income was £18,250 and surplus £15,853).

Expenditure

There have been savings on budgeted costs not spent, including:

- **Governance** – AGM costs were £4,000 less than anticipated, and the environmental policy was yet to incur any costs at year end.

- **Staff costs** – There was no CEO for part of the year, and the Institute had not yet recruited a membership manager.
- **Directors' fees** – These have come in over £10,000 less than the anticipated budgeted costs.
- **Social media** – Planned work on Facebook and LinkedIn ads and boosts was delayed.

Flagstone platform account

As mentioned in my report last year, we've been working on a safe place and best home for the Institute's cash reserves. I'm pleased to report that, during the year, we opened an account with the Flagstone platform. This platform allows us to split the cash held between several bank accounts. Now that this has been completed, 100% of the CIEP's cash reserves are covered by the Financial Services Compensation Scheme.

New accountants

During the year, we appointed 10CA as the CIEP's new accountants. They've completed their assurance report, which you'll see in the CIEP's accounts.

The year ahead

We continue to monitor the CIEP's financial position closely, and the Institute is in a good position to take forward its plans for the current year, including the recruitment of more staff to meet operational need.



Information

Abi Saffrey

For the first six months of the year, Margaret Hunter was in post as information director, and she continued to push forward her strategy of making our editing and business resources easily available to both members and those outside the Institute.

In August, Rich Cutler became the Institute's design coordinator, managing the team of designers that lay out the resources produced by the information team and by other remits. In September, Margaret stepped down from Council – with the parting shot of making all the Institute's guides free to members as digital downloads.

Huge thanks go to Margaret for setting the information team up and strongly steering it towards better access to our resources. Thank you also to the information team, for their creativity and productivity over the year; and to our writers, design coordinator and team, reviewers, copyeditors and proofreaders – our collection of resources is larger and stronger than ever before due to your efforts.

One of my first tasks following election at the 2021 AGM was to recruit another commissioning editor following my shift from editor to director. The standard of applications was so high, and our resource ambitions equally so, that we recruited two new information editors to the team. Harriet Power joined Liz Dalby and Cathy Tingle on the team in February 2022, while Julia Sandford-Cooke attended team meetings that month in preparation for joining it in the 2022/23 financial year. Recruitment for support across other remits was going on at the same time, and from that we recruited Steph Morgan as an internal communications editor. From January 2022, she worked with the team to get our newsletters (**The**

Edit and Editorial Excellence) into Campaign Monitor, our mailing platform, and to coordinate their publication. Steph's work means that the newsletter editors can spend more time on creating and commissioning useful content.

Alongside our newsletters, the information team continues to create and publish excellent editorial and business knowhow content. We published five new guides in the reporting year:

Punctuation, How to Work with Self-Publishers, How to Edit Cookery Books, Editing Fiction Containing Gender-Neutral Pronouns and Editing Scientific and Medical Research Articles.

Stan Carey and Tom Shakespeare got us thinking with their focus papers on how well read editors should be and disability terminology, respectively.

Our **Going Solo Toolkit** (a member benefit) was updated for the 2021/22 UK tax year, and new fact sheets covered editing and proofreading numbers, software for editing and proofreading, negotiating business contracts, emotional wellbeing, making online communications more accessible, and editorial judgement. We published a new **glossary of editorial and publishing terms** during the year, alongside a **climate and environment glossary**, compiled by the Institute's Environmental Policy Working Group (EPWG). The **blog** is full of informative and helpful content, with 102 new posts published over the year.



Do make the time to browse through our **resources**: all our practice notes and guides are free to members.

information@ciep.uk



Marketing

Denise Cowle

This year, the Covid-19 pandemic has continued to affect how we market the CIEP, which has opened up new opportunities and ways of working to promote the Institute.

Advertising

We continued to advertise in traditional print publications and online. The purpose of advertising is twofold: to raise awareness of the Institute and to promote its Directory of Editorial Services, thereby helping writers source reputable editorial professionals and driving work leads for our members.

This year's advertising budget focused on the *Writers' and Artists' Yearbook*, the *Children's Writers' and Artists' Yearbook* and the Alliance of Independent Authors' (ALLi) Self-Publishing Services Directory.

Events and sponsorships

Again, on-site events at which we would have been present were cancelled in 2021: the London Book Fair; the Society of Young Publishers (SYP) events, including SYP Scotland's annual conference; the International Association of Teachers of English as a Foreign Language (IATEFL) conference; and, of course, our own annual conference. Our focus was therefore on online events and reaching our target audience through session and event sponsorships, coupled with attractive offers for delegates.

BookMachine partnerships 2021/22

We've had partnership deals with BookMachine in both 2021 and 2022. In March 2021, we

sponsored its Editorial Season and ran an offer of a free self-assessed course for anyone joining at the full membership fee via the BookMachine website and promo code. We also had blog posts published on its site, and Kia Thomas took part in its Wednesday Wisdom live interview on our behalf. For 2022, BookMachine has changed the model from 'seasons', which gives us four to six weeks of promotional activities, to 'streams' that run throughout the year. We're part of the Editorial Stream.

SYP Scotland annual conference 2021

We sponsored a session at the SYP Scotland online conference and contributed a blog post to its conference pages. We offered all delegates a free copy of our *Your House Style* guide.

CIEP conference

We ran a large social media awareness campaign while conference booking was open, and again in the run-up to and throughout the conference itself. We promoted our session speakers and topics, the networking via our Wonder room and the general buzz around the event. It's fair to say that our members, as ever, contributed hugely to the chatter around the conference hashtag on Twitter, and there was plenty of FOMO reported by non-attendees – we hope they'll join us at our next conference.

ALLi Self-Publishing Advice Conference

We sponsored Sophie Playle's 'Crafting beautiful prose' session and created a landing site with nine free resources for conference delegates. Our sponsorship got good coverage on social media, and it was a successful awareness-raising campaign.

Promotional offers

Membership offer, August 2021

We ran a promotion offering free membership at the end of August, the admin fee being the only payment required. As a result of this offer, 361 new members joined the CIEP; we hope that, having seen what we have to offer them, they'll decide to stay with us when renewals come around.

Training offer, December 2021

We run a holiday promotion in December each year, and in 2021 we focused on our training programme for a one-week flash offer of a 30% discount on all courses. The uptake was tremendous, given the time of year, and brought in sales of £55,600.

Social media

Social media team

As the social media director's role evolved to that of communications director, the social media team has returned to the marketing director's remit. The communication and marketing directors work very closely on strategy with the social media team, so this has had little impact on the day-to-day working of the team. Over time, team members leave as their priorities and availability change, which is entirely to be expected with voluntary roles. Due to improved working practices, including the introduction of our new social media coordinators and the use of SmarterQueue for scheduling, the team has reduced in size while maintaining an excellent and consistent CIEP presence across our social media platforms. Thanks to them for their commitment to a vital role that's central to our marketing strategy.

Recruitment – social media coordinators

We recruited two paid social media coordinators in November 2021. Andrew Hodges is reviewing our evergreen blog content to ensure older posts in particular align with our values, especially EDI and accessibility, and identifying outdated content

that needs either tweaks to update it or more substantive rewriting. He'll also identify any obvious gaps where new content could be commissioned.

Eleanor Abrahams was appointed to the second post. She creates artwork and suitable lead-in text for our social media posts, schedules them on SmarterQueue and liaises with the information team to streamline the process by which blog posts are readied for publication. Eleanor is also now responsible for writing the social media news round-up every two months.

Email marketing

Editorial Excellence sign-up

Work is progressing on an effective email marketing strategy. We revamped the sign-up page for Editorial Excellence and the corresponding web page to make them more attractive, and we pinned the sign-up to the top of our social media pages. This brought us a marked increase in subscribers who we can now engage with via our email newsletter.

Working groups

As marketing is a cross-remit function, the marketing director is a member of several working groups (WGs), including the Web WG, the Publishing WG, the Values WG, the Member WG and the Marketing and Communications WG, to ensure that sales and marketing are considered in new developments, and the user experience is front and centre.

The pride in CIEP membership that our members share on their websites and social media profiles, our celebration of fellow members when they share their successes online and support for them through their low points, and the way members step up to promote our membership and training are the most valuable and authentic marketing we could hope for. Our members are the best marketing team and I thank you all for it!

marketing@ciep.uk



Membership

Sue Browning

In spite of the continuing global pandemic, our 2021/22 membership year started strongly, with record numbers of new joiners between March and June 2021. There was another surge in August, as people joined in response to our marketing promotion towards the end of that month. Overall, our annual total of newcomers was the highest it's ever been, at 1,550. Of course, the pandemic and recession have affected our existing members too, so we're grateful to you all, both new and long-standing members, for continuing to support us and our activities in these difficult times.

A little over 20% of our members are based outside the UK. This number has been increasing steadily since 2015, when our international membership was 10%.

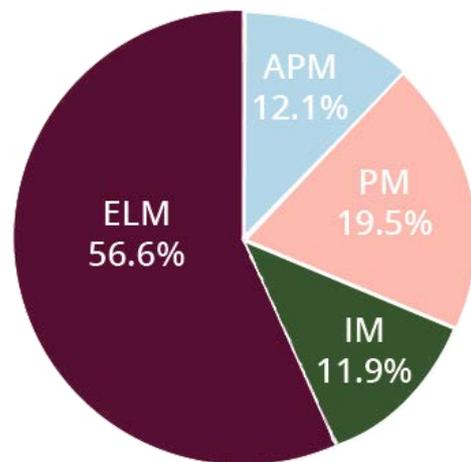
Balance of membership grades

We've always had a high proportion of members at the Entry-Level grade (between 54% and 68%). The numbers vary from year to year, the current balance being pretty typical.

Membership numbers: overview

We ended the year with 3,573 individual members and 44 corporate members – a total of 3,617 members, a net gain over the year of 137. This represents a nearly 4% increase over last year, meaning that we're still growing, albeit a little more slowly than in recent years.

The numbers of members at the different grades can be seen in the table, with last year's numbers for comparison.



Member type	No. at 28 Feb 2022	No. at 28 Feb 2021	% increase/decrease
Advanced Professional Members (APM)	429	397	8.1
Professional Members (PM)	693	610	13.6
Intermediate Members (IM)	423	345	22.6
Entry-Level Members (ELM)	2,013	2,070	-2.8
Retired Members	15	21	-28.6
Total individuals	3,573	3,443	3.8
Corporate Members	44	37	18.9
Grand total	3,617	3,480	3.9

The overall lapse rate for both individual and corporate members was around 37%. That's a little better than last year, at the height of the pandemic, when it was 43%, but still worse than typical rates (around 30% on average). As is usual, the biggest loss was at the Entry-Level grade, which represented 83% of overall lapses; we lost almost 50% of these members. This grade encompasses both newcomers to the profession and those who are testing the waters, so it's not surprising that we have a high turnover at that level. The good news is that our more experienced members tend to stay with us – we lost only 13.5% of our Professional Members and 10.4% of our Advanced Professional Members. Our lapse survey showed that the

main reasons for members leaving are changes in personal circumstances and moving out of editorial work (about 40% of those who gave us a reason cited those two issues), as well as retirement (7%).

This has been another difficult year for many members and their families. So, we're not only grateful to you, our members, for sticking with us, but also we've been delighted to see such high levels of engagement on the forums and in local groups, and in members taking part in working groups and other activities that support the Institute. You make the CIEP what it is. Thank you!

membership@ciep.uk



Organisational

Martin Walker

This report covers the period from 1 March to 11 September 2021, when I left the CIEP Council. The role of organisational director operated largely behind the scenes, organising and minuting Council meetings. The CIEP Council continued to meet on Zoom at least every four weeks, and sometimes more often. It became clear to us that this new way of working needs to inform the way Council operates in future, not least to reduce the environmental impact of our activities.

There were two parts of the organisational director role that were more member-facing. The first was the AGM, which took place on 11 September 2021,

before the annual conference. This was again run as an e-AGM. This confirmed our conclusion from 2020 that holding an e-AGM allows for much greater member participation.

The other was the consequence of a proposal submitted to the 2020 AGM that the CIEP develop an environmental policy. In response, the Council formed an Environmental Policy Working Group (EPWG) of members.

After the 2021 AGM, the organisational remit was retired, and its responsibilities were shared across other remits, including communications and the vice-chairs.



Professional standards

Lucy Metzger

This has been another year of progress. Most importantly, we expanded the team to meet the increased demand for membership upgrades and prepare for the valuable work yet to be done on overhauling the admissions procedure.

Admissions Panel: recruitment and development

The CIEP's Admissions Panel is the team that assesses applications to the CIEP's membership grades. Our grade structure is a core part of the CIEP's commitment to upholding and promoting professional editorial standards, and the Panel members, together with our office team, are central to making this work. Two members of the Panel announced approaching retirement this year. In view of that and a surge in upgrade applications in 2020, we decided to recruit four new Panel members. We invited all Advanced Professional Members to apply and received more than 30 applications, a wonderful response: once again, our APMs showing their commitment to our Institute and what it stands for.

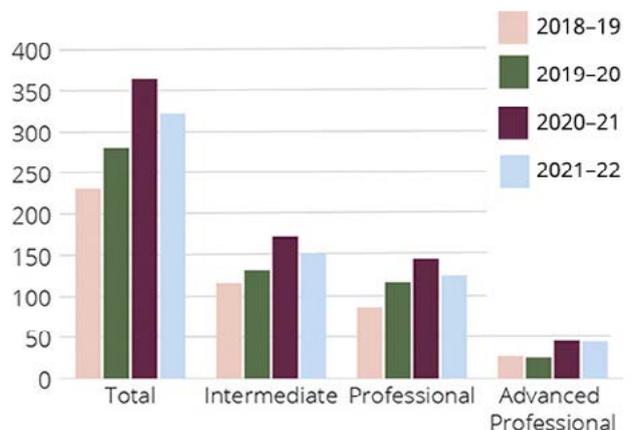
In advance of the new recruits joining, current Panel members delivered a much-needed overhaul and update of the guidelines that the Panel uses and developed a completely new formal training programme and bank of training materials. Two new members started training in December 2021, each partnered with a mentor on the Panel. At the time of writing, the two recruits are fully up to speed, with another two due to begin in March 2022.

Meanwhile, on the basis that the expertise and knowledge accumulated by an Admissions Panel member can only benefit our Institute, in January the Council voted to remove the time limit for Panel members' service (which had been eight years). Our upgrading criteria and process themselves must,

though, move with the times, so that the Panel's decisions do the same. We are working with the Panel on updated admissions procedures, which we'll present to the membership during 2022.

Membership upgrades

In the year from March 2021 to February 2022, 322 people applied for a membership upgrade. This represents a drop of 12% from the previous year, in which we saw an unprecedented surge in upgrade applications, but it remains more than in any other year to date. While the number of applications for Intermediate membership approved was down on the previous year, awards of Professional membership stayed level and of Advanced Professional membership increased (see table).



Membership grades awarded	2020/21	2021/22
Intermediate	115	99
Professional	71	70
Advanced Professional	20	27

Last year, the administrative load presented by the upgrading system combined with the effects of the pandemic to produce a serious backlog in

the processing of upgrade applications. Thanks to truly heroic efforts by our office team and steadfast support from the Admissions Panel, the backlog was fully cleared, and we believe we now have good systems in place to make it unlikely to recur.

Complaints

In December 2021, the CIEP received a formal complaint against a Professional Member. The nature of the complaint involved a possible breach of the CIEP's **Code of Practice**, which all CIEP members agree to abide by when joining the Institute. In line with our **Complaints Procedure**, a panel of three Advanced Professional Members was appointed to investigate the complaint; at time of writing, the investigation is ongoing.

Formal complaints against members are rare, but we've continued to refine and update our Complaints Procedure regularly, informed by past experience. It's there to protect not only our members' clients and employers but also our members themselves: all stakeholders benefit when expectations and remedies are clear.

Editorial test

The CIEP introduced its **basic editorial test** so that members who don't come from traditional publishing backgrounds can demonstrate the core skills and expertise needed for proofreading and copyediting. Many members use a test pass in support of their applications to upgrade their membership. Since 2014, when we introduced the test, 502 members have taken it, of whom 332 (66%) have passed.

This year, we arranged for the test to be made accessible to a member with a disability who would not otherwise have been able to take it. We encourage members who encounter any such barriers to make them known to us, so that we can work together to remove them for both present and future users.

standards@ciep.uk



Special projects

Vanessa Plaister

A new remit aiming to secure the Council's focus on those governance and operational matters that had commonly crossed – or sometimes slipped through gaps between – remits, special projects came into being shortly after the CIEP's 2021 AGM.

Supporting CIEP strategy

First on the agenda was sourcing support for strategy work that had long been pushed aside: the year ended with facilitators for Council strategy sessions taking centre stage and a proven transformational change consultant waiting in the wings. Not only had we recognised that we could drive change to governance and operations even without a CEO at the helm, but also we were increasingly hiring in short-term expertise where it would save the CIEP money and time, as well as enrich outcomes.

Building Council capacity was explicitly part of the strategic development work proposed for early in 2022; building operational capacity was at the heart of ongoing work on the CIEP's organisational structure.

One special project saw us finally wrestle into shape a **decision tree** defining the reward and remuneration of CIEP staff, contributors and volunteers. Long a thorn in the Council's side, such decisions could now be rooted purposefully and comparatively, and they would valuably ground the volunteering framework within which we shape those roles appropriately delivered by member volunteers.

Paid contributors, meanwhile, continued to be subject to contract – and for support there we turned to **Markel Law**, our newly appointed legal advisers.

Intellectual property matters

Alongside Markel Law, we consulted **nQ Legal** for specialist issues of intellectual property law. Another discussion commonly benched when more urgent issues demanded attention, defending our intellectual property is ever more critical as we promote it more widely.

In October 2021, we began to investigate registration of the CIEP's name and logo as trademarks. We were disappointed to find that the word had long been registered in both the UK and Europe by a Dutch company engaged in precisely the same classes of activity for which we would seek registration, but in very late December we got word that the company had agreed to a coexistence agreement. By the end of February 2022, our specifications were with that company for formal consent and would shortly land before the UK Intellectual Property Office.

In the meantime, we and nQ Legal drafted cease-and-desist letters to suffice in those instances in which natural and legal persons unlawfully seek to benefit from the CIEP's reputation by passing themselves off as members or associates.

Alongside this work, and prompted by excited CIEP learners increasingly sharing their PDF certificates on social media, we asked a member volunteer to research digital credentials: a way of both protecting and promoting the CIEP's intellectual property, and of spotlighting our training in the marketplace. The Council was pleased by the findings, met with a leading provider and reached consensus pending upcoming strategic work, a full cost-benefit calculation and membership consultation.

Fair pay and recruitment practices

While the special projects remit was new to the Council in late 2021, the earlier part of the year had seen several special projects delivered nominally under the community remit. The very start of 2021/22 saw the CIEP become an **accredited Living Wage employer** and relaunch its advertising offering, with a new **rates card** and a revised **ad form** requiring would-be employers and clients to recognise both the Living Wage and the CIEP's **suggested minimum rates**. In this small way, we hoped to have an effect on fair pay in our industry – and we've gone on to enforce this requirement strictly, having conversations with both publisher and packager advertisers about fair pay and even inclusive recruitment practices.

Indeed, the CIEP as an employer has itself come into focus under special projects as a consequence of recruitment to the new membership manager role within its small – but growing – staff.

Recognising in early January the ways in which we can – arguably, must – distinguish the CIEP as an inclusive employer if we're to appeal to quality candidates in a keenly competitive jobs market, we injected best practices across all of our recruitment and selection activity. With advice from our external HR consultancy, we've shaped processes ranging from defining and advertising our vacancy, through shortlisting and interviews, to offer and induction, that we hope will build a positive psychological contract – even as we own that the CIEP is an organisation at the very start of what's likely to be a long change journey.

At the end of February, we had made an offer to a convincing candidate whose performance during competence-based interview had exceeded expectations, and we looked forward to welcoming them into the new role in summer 2022.

Business continuity and key person risk

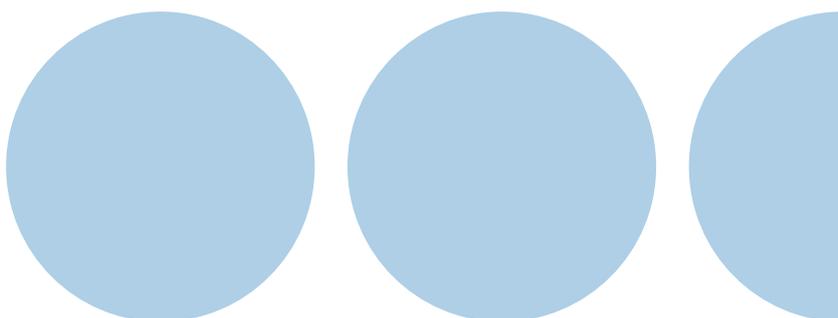
At the start of November 2021, I relocated from the UK to Canada and the Council began to work across two time zones. With an increasing international membership (20% at the end of 2021/22 – see **Membership**), excluding from participation in governance those members based outside the UK had long been a bone of contention, and the Council welcomed the opportunity to put inclusive principle into practice.

And it was in preparation for this move and for remit handovers that business continuity and key person risks came to the fore. Taking a sharper look at the staffing of the CIEP, we exposed knowledge and capacity gaps – and we took some steps to secure business continuity in the event of a key person emergency.

Key person risk was acute in areas such as training, where much lay behind the scenes. Equipping directors to understudy in the event of an emergency was the goal, and we set about bringing all content into CIEP-owned and Council-shared online spaces, as well as building remit-specific operational notes with which any director might pick up the reins of another.

While some work remains to be done, the value added by this activity has been marked: the work of an outgoing director preparing for their successor will be lessened, and operational notes partner with a Directors' Handbook fully revised and reformatted in 2021/22 to anchor Council performance.

specialprojects@ciep.uk



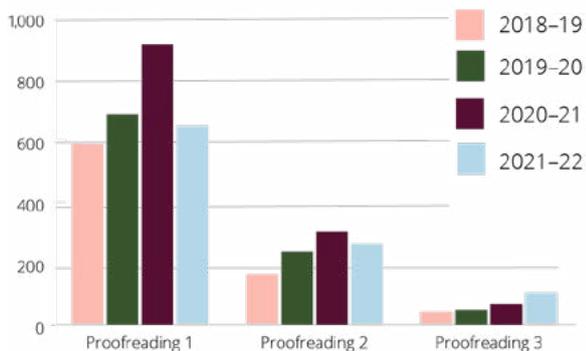


Training

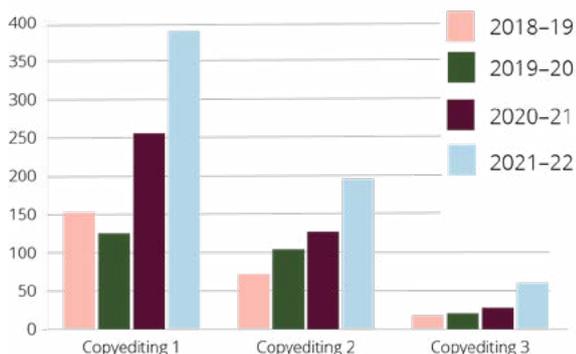
Jane Moody

Training comprises around one-third of the CIEP’s income and plays a crucial role in maintaining the financial stability of the Institute. We now have 21 courses. Of these, 19 are online (4 are tutor-marked and 15 are self-directed learning), and 2 are webinar-based. To support these courses, we currently have 38 tutors, of whom 18 are tutors for the assessed copyediting and proofreading courses.

A total of 2,306 people purchased CIEP online courses in 2021/22 (compared with 2,311 in 2020/21). As always, our proofreading courses were most popular, although numbers fell back slightly from the ‘lockdown’ year of 2020/21, perhaps unsurprisingly as people went back to work.



The same was not true of our copyediting courses, which continue to grow in strength, perhaps showing a broadening of the skills of our membership in general. Encouragingly, take-up of the more advanced courses is also increasing.



Thirty-three people joined the webinar-based Efficient Editing: Strategies and Tactics course, which ran three times during the year. We now have two tutors presenting this course, which spans four two-hour sessions. Each course is held at a different time of the day to allow participation from as many time zones as we can manage across the year.

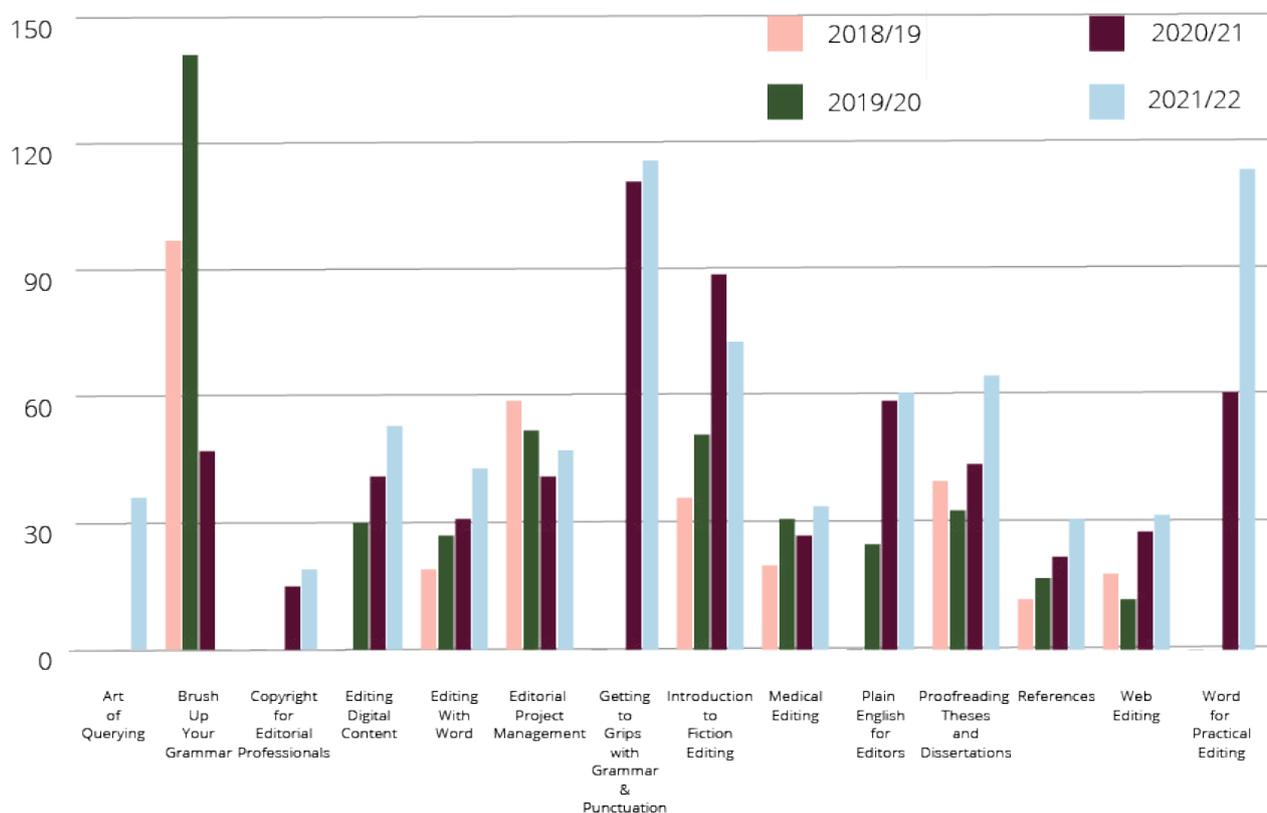
Most other courses increased their take-up in 2021/22. Of the general editorial courses, the two grammar courses (the old Brush Up Your Grammar and the new Getting to Grips with Grammar and Punctuation) were most popular, which fits with the findings of the CIEP tutors, who often comment that these areas are the ones where students request most help.

A new online self-assessed course, The Art of Querying, was launched in November and is already proving popular.

At the end of the CIEP year, we signed with Crowd Wisdom (see **Digital services**), and we will be moving our online courses across to the new platform during the coming year. The new platform will allow us to refresh our presentation and include different elements in our courses. One big advantage will be a single login to the main website, with access to all your courses in one place.

Exercise Bank

The Exercise Bank is a collection of individual exercises, each of which can be purchased separately, covering copyediting, proofreading and aspects of grammar. We finally launched the Bank this year. We’ve made one proofreading exercise freely available to members as an introduction to the Bank. We’d like to commission further exercises, so if you’re a Professional or Advanced Professional Member and would like to contribute an exercise, please get in touch with the training director.



Curriculum

The Curriculum for Professional Development went live on the website in 2020, and since then it's been a useful resource for members. We've updated it during the year as new resources have become available. We hope that the new web platform will allow a more dynamic presentation of the curriculum in the future.

In-house courses

The pandemic meant that most in-house courses did not take place in 2021/22, but we went ahead with one talk on plain English for the IFRS Foundation. The talk was well received.

Mentoring

We suspended the CIEP mentoring scheme at the end of the year to allow for a full strategic review of the scheme. Sixteen people had signed up for mentoring during the year, and all these mentees will complete the course in its current format.

training@ciep.uk

About proofreading and editing
ciep.uk/about/faqs

Code of Practice
ciep.uk/standards/code-of-practice

Conference
ciep.uk/networking/conferences

Directory of editorial professionals
ciep.uk/directory

Events
ciep.uk/networking/calendar-of-events

Fact sheets
ciep.uk/resources/factsheets

Guides
ciep.uk/resources/guides

Membership
ciep.uk/membership

Newsletters
ciep.uk/resources/newsletters

Training and CPD
ciep.uk/training



Chartered
Institute of
Editing and
Proofreading

The Chartered Institute of Editing and Proofreading (CIEP) is a non-profit body promoting excellence in English-language editing. We set and demonstrate editorial standards, and we are a community, training hub and support network for editorial professionals – the people who work to make text accurate, clear and fit for purpose.

We aim to be:

- a recognised authority on editing and proofreading in English
- a supportive community for editorial professionals who are working to high standards
- a trusted source of advice, information, best practice, training and qualifications
- the place to find professional editorial services.

We have around 3,000 editorial professional members in the UK and beyond, with a growing international membership, who work for a wide range of clients – publishers, businesses, government and other organisations, academic institutions and authors. We formed in 1988 and were known as the Society for Editors and Proofreaders before being awarded our Royal Charter in 2019.

If you're working as an editorial professional – join us

If you'd like training in editorial skills – take our courses

If you're looking for an editor or proofreader – search our Directory

ciep.uk

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