
report from the chair

penny williams

After the 2006 AGM we decided to set up a professional development steering committee, headed by Jane Ward as professional development director, to look at co-ordinating our efforts in training, mentoring, Accreditation and qualifications and to explore the possibility of obtaining funding to develop basic-level tests. From September 2007 the new Professional Development Board (PDB) will take responsibility for Accreditation, mentoring and test development.

Towards the end of 2006, we were concerned about the impact that the withdrawal of the Paul Hamlyn Foundation grants would have on new freelancers' ability to take courses and to upgrade to ordinary membership. In January, we announced the Sue Thomson Foundation grants, available to associates needing to take a training course to get those last few points necessary to upgrade. The low take-up of these grants has been disappointing. Of eight applicants so far, two were judged eligible to receive the £100 grant. We are sure there must be many other associates who have almost enough points to upgrade – if this is you, please contact the office for details. If we don't use the money we have now, we're unlikely to receive more next year.

One new director – Lotika Singha, given the conference brief – joined the council at the last AGM. I am grateful to her for volunteering for this responsibility and I am equally grateful to my council colleagues and all the other members and associates who have helped the Society for their support, hard work and commitment during the past year. At this year's AGM, four long-standing directors will be retiring from the council.

Sara Hulse joined in 2002 and has served as PR and marketing director. During her term of office she has helped raise the Society's profile considerably – a highlight was the BBC competition that ran over Christmas 2005. Her professional approach to PR and marketing has transformed our public image.

Jane Ward also joined in 2002, serving as conference director and for the past year as PD director. She organized four successful conferences and initiated our professional development days for experienced members. This year she oversaw the setting up of the PDB (see Professional development report). During her term of office she has come up with many ideas and questions that have provoked stimulating discussions.

Penelope Lyons joined in 2003 and has served as accreditation director. She has tackled some very difficult tasks – culminating in the smooth transition of Accreditation test administration to the SfEP office and amalgamation of the Accreditation Board and the PDB – with efficiency and good humour.

Last, but by no means least, is Valerie Rice, who joined in 1999, serving first as local groups co-ordinator. She took over the finance brief in February 2001. Under her able stewardship, the Society's finances have improved to the point that we now feel able to appoint an executive secretary. She also played a key role in setting up the Society for Editors and Proofreaders Limited and making it the thoroughly professional organization it is today. We shall miss her.

finance

report for the financial year ending 28 february 2007

valerie rice

The financial statements for the year ending 28 February 2007 show a much healthier balance sheet than in 2006. The Society's total assets – less current liabilities – are £44,076, compared with £11,646 at the same time last year. As most of our income comes at the beginning of the financial year (March onwards) we usually have a healthy bank balance by June and I have, as in past years, placed £100,000 in a Treasury Reserve account for six months as this gives a higher rate of interest. It also enables us to hold monies in reserve towards the end of the year. We have now resolved our VAT problem and this has made a significant difference to our VAT account.

The schedules on page 8 of the financial statements give details of the income and direct costs for the year, and the administrative expenses. Although we show a breakdown of the income and expenditure for the different cost centres, all our income is pooled so that we can use it to fund all our activities and to cover the running costs of the Society. Subscription income again increased significantly, as did the income from training and in-house training courses. The 2006 conference made a small surplus. *Directory* income continues to increase as more members take advantage of this cheap form of advertising. Feedback from members and clients indicates that increasing numbers of publishers and others are using the online *Directory*. We have addressed our concerns over Accreditation and mentoring (see Accreditation and Professional development reports) and mentees are now asked to pay a small amount towards the cost of being mentored.

I am pleased to report that more donations were made to both the Whitcombe Training Fund (WTF) and the Dorothy Mitchell Smith Memorial Fund (DMSMF) as a result of the appeal sent out with subscription renewal notices. We also gave the proceeds of the raffle at the 2006 conference to these two funds. At present the WTF is used to offset partially the costs of administering the Accreditation and mentoring schemes, but it will soon be used for its original purpose: buying and commissioning new courses. The DMSMF was set up to encourage people joining the Society to attend our training courses. We give each new associate two vouchers that can be used to defray the cost of one training course in each of the first two years of membership.

Our administrative expenses have increased. Some directors have to spend considerable time on special projects outside their normal remit and are being reimbursed for this. We hope that by employing an executive secretary the directors will not be called upon to do as much voluntary work as they have done in the past. We pay a monthly fee for maintaining and updating the new website and we are grateful to John Marsden for his work on this.

We have a good team in the office: Helen Martin, office manager, and Bridget Buckle, part-time finance

officer, both of whom carry out their duties efficiently and with great good humour and we would like to thank them for their hard work during the year. We appointed a part-time accountant to take on some of the finance director's tasks, but unfortunately he died shortly before taking up the post. We have now made an arrangement with our accountants, Warrener Stewart, and they will be taking over some of the finance function in September. They are also administering our monthly payroll.

We calculated last year that our subscription income, including upgrade fees, accounted for only 41% of our total income. We aimed to increase this to at least 50% and are pleased that this year our subscription income, including upgrade fees, accounts for 45% of the total. We propose to raise all individual subscriptions for 2008/09 by £5 and the administration fees for joining, upgrading membership (admission), admission re-application and admissions appeals by 10%. These fees were last increased in 2003.

membership

shena deuchars

On 31 July 2007, there were 1231 individuals in membership, categorized as follows:

Membership category	2007	2006
Advanced members	254	232
Ordinary members	388	415
Associates	589	620
Total	1231	1267

Of the above, 39 are founder members and 7 are honorary members. The spread of individuals among the categories is relatively static and we would strongly encourage people to apply for admission to ordinary and advanced levels.

In the five years that the current membership structure has been in existence, 170 people have applied for an upgrade and only three have not been awarded it. Those who would like to upgrade, but whose experience and training do not fit the criteria, should contact the membership director.

Applications to become an associate have remained steady over the past year at around 30 per month.

We also have 40 corporate associates.

membership liaison and benefits

john marsden

Associates Available, a fortnightly SfEPA announce mailing, lists associates who have notified their availability with their qualifications and contact details so that members who have work to subcontract can contact someone suitable.

Other benefits include the provision of training vouchers for associates, discounts on books (including for a period the new edition of *Butcher*) and free tickets to the London Book Fair. The FirstAssist legal helpline received 100 calls from SfEP members between 1 June 2006 and 31 May 2007. The two largest categories of enquiries were contracts (34%) and employment (10%). Remember that you and anyone in your household can get advice on any legal matter – it does not have to be work-related.

Chris Shaw (chris.shaw00@btopenworld.com, tel 020 7639 6635) continues to run the Information Exchange, which enables members to share information about clients and helps them with problems such as late or non-payment of invoices.

Following the appointment of the executive secretary we will no longer be able to offer the small meeting room for the use of advanced members. However, they can hire the boardroom at Riverbank House (£10 + VAT per hour). Please contact Helen Martin, our office manager, to book the room.

All members' benefits are listed under 'Membership' on the website. If there is anything you think we could add to this list, please contact the membership liaison and benefits director.

professional development

jane ward

In 2006, the council saw a need to address two issues. The first was the Society's finances, particularly the level of expenditure over the previous five years on Accreditation and mentoring. The second was to help associates move to full membership and so be able to take a *Directory* entry and access clients, at the same time ensuring that membership is equated with competence. As a result, a professional development director and a steering committee (linked to the Accreditation Board and mentoring committee) were appointed to produce proposals to progress professional development and to identify priorities among competing needs for funding.

It was agreed that we needed to develop a set of tests that were suitable for progression to ordinary membership. These would show competence in basic skills for all areas of work and also offer an option to show competence in a specialization. The points requirement for movement up the membership levels would remain, but there would be more options in the way these could be obtained. There will be no change in the number of training points required, reflecting our commitment to professional development. However, it is already possible for individuals to argue that they are a special case if their experience has provided them with good training but outside the usual publishing setting.

Two developments will support these initiatives. First, the mentoring scheme will be enlarged. Second, we will develop online exercises with an answer sheet that can be accessed for self-testing. These can be used as practice exercises in preparing for the membership tests, for moving into a new field, or for professional development. The provider of each test will be available to give feedback for a small fee, thus enlarging the scheme with a distance mentoring aspect and enhancing the role of mentors.

From September 2007, there will be a Professional Development Board (PDB) headed by the professional development director. It will include two former Accreditation Board members, Sylvia Sullivan and Kersti Wagstaff (thus providing continuity), plus David Tait and Wendy Toole; the mentoring and training directors will have a watching brief. The PDB will be responsible for moving forward on these initiatives and for ensuring that all aspects of mentoring, training and testing are co-ordinated. The speed of progress will depend on funding, and outside sources will also be pursued. Initially, the PDB will concentrate on tests for moving from associate to member, mentoring and distance learning.

accreditation and registration

penelope lyons

In my report last year, I said that I saw 'a need for an earlier test as a milestone on the road to the existing Accreditation test' and that the Accreditation Board hoped 'to develop such tests in the future'. We have moved on a considerable way since then.

When the professional development steering committee was set up to address council's concerns regarding funding and testing, the Accreditation Board (AB) agreed to devise an outline structure for a set of competence tests that would assist associates to progress to ordinary membership. Accordingly the AB developed and submitted the outline scheme of basic tests (*Editing Matters*, March 2007) that the PDB will be progressing from now on. At the same time, we upgraded the Accreditation test to confer advanced membership automatically. We feel this better reflects the demands of the Accreditation test. All who had already passed the test and who were not already advanced members were offered a membership upgrade.

The AB as a separate unit will cease to exist from September 2007 and will be replaced by the PDB chaired by the PD director. This is entirely sensible as we need now to progressively develop training, mentoring and testing procedures within a wider remit. As not everything can be done at once, and there are many associates who need to upgrade, the 'entry-level' tests for ordinary membership will be the first priority along with the supporting initiative of self-test development. Further developments in Accreditation will follow later – I look forward to hearing about them.

mentoring

virginia masardo

One of the aims of the professional development steering committee was to take a fresh look at the direction mentoring should take, after a thorough examination of failing finances and static practice. The mentoring committee (comprising the mentoring director, the training director, the PD director and special adviser Kersti Wagstaff) had a meeting with our team of five mentors. It was a great success and the mentors' input was extremely valuable. It was agreed that:

- The committee should operate as a part of the new PDB, so that decisions and proposals will be worked out in tandem with training and Accreditation.
- Mentors should continue to work as before, but another meeting would be held to examine what is needed from mentors to meet the constant changes taking place in all forms of publishing and to devise a set of new practice guidelines.
- A charge levied on mentees to cover a portion of the overall costs should take effect immediately.
- An email discussion group should be set up for mentors to allow discussion of ideas and problems. They should also meet annually.
- The qualifications and procedure for mentoring should not change: applicants must have been successfully passed by the course tutors for the Proofreading Problems and Copy-editing Problems courses; and applications are made to the office.

The implementation of 'joined-up' mentoring initiatives will go ahead as from September 2007.

training

sarah price

Our scheduled training programme is a continuing success, with courses running in London, Bristol, Glasgow and York and at the 2006 conference in Nottingham. We also added Edinburgh to our list of training venues outside London this year. The Proofreading for Accreditation course has been updated

during the year, running for the first time in its new form on 25 July. Thanks are due to Gillian Clarke, the course tutor, and Judith Wardman, our Accreditation moderator, who reviewed the materials.

As always, a big thank you is due to our office staff, who continue to administer the programme so efficiently, our team of co-ordinators and day organizers, led by Lesley Ward and Margaret Aherne, our in-house training co-ordinator, Penny Poole, and our excellent team of tutors.

penny poole, in-house training co-ordinator

Winning repeat business is always encouraging. Following the success of programmes developed for Westminster City Council and L'Oréal UK, our tutors returned to these organizations – once again getting consistently positive feedback from delegates.

We have also added a number of new names to our client list, delivering both established SfEP courses and bespoke programmes in house; these include: Blackwell Publishing, the Wales Audit Office, The Company of Biologists, Pearson, the Irish Publishers Association, Parexel and Tribal Group (one of OFSTED's regional agencies).

Discussions about course development are currently under way with several more organizations, including a government department, a major financial services provider and a commercial airline.

SfEP in-house training clearly has significant growth potential. We are committed to maintaining a methodical approach, responding promptly and efficiently to enquiries, offering an expert assessment of clients' training needs, taking particular care in tutor selection and ensuring that those who deliver training on our behalf get the appropriate support and administrative back-up they need.

conferences

lotika singha

The 17th annual SfEP conference was held in Nottingham. Overall it was a success, with a record number of delegates (130). Considerable sponsorship was raised. Almost everybody found the programme well balanced and enjoyed themselves. First-timers were invited to meet the council over drinks after the AGM. This was well attended and will be repeated again. Feedback from first-timers indicated that they felt welcomed and found all the sessions valuable in some way. More experienced members and regular attendees were also positive about most sessions. The university campus as a venue went down well and it seems a university venue will be the preferred option in the future.

Lectures and seminars received far more praise than criticism. John Button's opening lecture on what it means to be 'Truly professional' received practically universal acclaim, appealing to all levels of the membership. The Whitcombe Lecture, by Ian Ritchie, inspired a lot of discussion on wikis (and blogging) and this will be a topic we could cover in other ways at future conferences. Other lectures continued the theme of being professional, covering marketing and taking a client-focused approach.

Most of the feedback on the workshops and seminars was positive, including the Adobe computer-based workshop despite the lack of appropriate software. There were some who felt that there was not enough time for workshop leaders to answer all the questions. If similar feedback is received at the next conference, longer workshop times may have to be considered. During the reception before the conference dinner, the delegates

were joined by the winner of the Nottingham Proofreading Challenge, who received her prize from the SfEP chair, Penny Williams. At the medieval banquet, several members joined in the fun by dressing up for the occasion.

Future conferences will continue to aim to fulfil the learning and business needs of editors and proofreaders wanting to keep abreast of the rapid changes and technological advances taking place in publishing today.

internet

nancy duin

The greatest changes to the SfEP website – www.sfep.org.uk – this past year were the aesthetic redesign ('reskinning') by designer Sue Davis and the technical revamp by webspinner John Marsden, both of which finally went 'live' in June 2006. It has been extremely gratifying to have received plenty of praise for this and virtually no complaints. Now that this work is complete, we are continuing to add to the content of the website and improve its usability.

A 'Collective wisdom' section can now be found in the public part of the website, accessed via a link on the right-hand side of the home page. At present, this contains the *SfEP Review of Books* and *SfEP Recommended Reference Books*, and one or two more items will be added in the near future. We hope that this section will attract both the public and potential clients to the site, as well as provide content of interest to members and associates.

The Members' area is the next target for a revamp. It already contains new items – such as the *Rates for the job* section collated by Jean Rollinson – but the plan is to create an information architecture for this restricted part of the website and populate it with really useful information and 'tools' for the membership. We hope that, as well as helping existing members, this content will attract new ones.

Among its many other functions, the website also contributes to the Society's coffers. When members purchase items from Amazon and Viking after clicking on the links to them on the home page, the SfEP receives a small percentage of their payments. This year the income received from this was £144 from Viking and £525 from Amazon (the latter amount should increase in the future because of all the Amazon Affiliate links now in the new 'Collective wisdom' section). These sums more than pay for the Google Adwords service, which cost £375 this year.

The *SfEP Directory of Editorial Services* completed its first year of solely online existence. Oversight of it has been transferred to the internet director from the publications director. There have been a few hiccups in ensuring that all those who have paid for entries or renewals appear in the final listing, and we are working on procedures that will reduce these instances or eliminate them altogether. It has also been a bit difficult to persuade members to update and improve their entries throughout the year, despite prompts from the *Directory* manager. However, new application and renewal forms are planned, as well as the provision of advice on how to improve entries so that they appear in relevant search results.

I also now have oversight of SfEPLine, the Society's email discussion list, acting as the point of contact between our excellent moderator and the council.

john marsden, webspinner

Over the past year we have continued to update and expand the Society's website. As webspinner, I handle

the technical side of changes and additions, while Nancy Duin handles the editorial aspects.

The site continues to attract an increasing number of visitors – in the 12 months to 30 June 2007, the web server recorded more than 810,000 unique page views (2006: around 650,000) to visitors in over 286,000 sessions (2006: around 250,000). About 76% of these sessions originated in the UK (30%) or the US (46%) (2006: 86%, 34%, 52%).

The annual update to the *Directory* was carried out in late 2006 by Rod Cuff. This year, searches of the *Directory* increased by a staggering 450%: in the 12 months to 30 June, 83,682 entries were retrieved via the online search engine, compared with 18,500 in the previous year.

Not all members and associates have applied to access this section, but it continues to attract new applicants (around 300 applications have been processed this year). The number of subscribers now hovers around 1,040, about 84% of those eligible – an increase of 8%. We plan to expand the content of the Members' area significantly in the coming year.

rod cuff, online directory manager

This has been the first year in which the *Directory* has been online-only. Numbers remain healthy (466 in mid-July), and all but about 30 of the 2006 entrants renewed. An average working day sees 150–200 searches.

One idea behind an online-only *Directory* was that members should be able to update their entries directly, but this proposal is now on the back burner.

Content is no longer bound by restrictions imposed for the print version, but members have been slow to accept the standing offer to have, for instance, longer free text or more emboldened subjects. We recently invited SfEPAnnounce subscribers to comment on what a *Directory* entry might contain and how it could best be presented to display a member's wares. We hope that this exercise will result in a revised application form on the website and a modest revision of content for the 2008 version.

At renewal time, members will be urged even more strongly to imagine themselves in the position of their potential clients and to craft verbal lassos to rope 'em in.

wendy toole, SfEPLine moderator

SfEPLine continues to be a popular resource for the exchange of information and advice and the discussion of work-related matters and other topics of interest to subscribers.

I have now been in post as moderator for 18 months, with Chuck Brandstater as deputy and John Marsden running the 'trivia-free' mechanism for those who prefer not to have the more light-hearted off-topic material delivered to their inboxes.

At present, 533 members and associates are subscribed, and there is a steady flow of new applications. The average daily number of posts has risen over the past year, and there has been some research into alternatives to the present Yahoo! Groups system that might cope better with the heavier traffic and offer greater flexibility. The plan is to offer a range of options to subscribers rather than simply replace the present email service. In April 2007, a cohort of SfEPLiners tested a web-based forum, and the next step will be to try integrating such a forum with a mailing list. It is intended that everyone will be able to receive SfEPLine messages in the format of their choice.

pr and publicity

sara hulse

The SfEP continues to raise its profile within the publishing industry and general awareness of the Society in other areas of industry appears to be higher than ever. The number of membership applications continues to increase.

Media releases sent out during the year publicized events such as the annual conference and the launch of the new SfEP website. The website now incorporates a news page, which is updated regularly with items of interest to SfEP members. Although we chose not to continue our relationship with Integra Communications, media coverage about the Society has continued, with articles appearing in the *Times* careers section, the *Bookseller*, and magazines such as *Director* and *Internal Communications*. We were also asked to provide updated copy for the DfES website relating to job descriptions for proofreaders and copy-editors.

A lot of work was done last year on raising awareness about the Nottingham conference and encouraging people to book for this year together with raising sponsorship for the event. Work is already under way to promote next year's conference in Oxford – which will be bigger and better than ever because it will be our 20th anniversary.

Much effort has gone into maintaining and improving our list of contacts with the media and various publications, and in developing relationships with the Society's many corresponding organizations. The database of contacts at major publishers has also been improved and updated, with the addition of email addresses as far as possible. All of these contacts are sent media releases and other information about the Society such as its annual conference and *Directory*. We plan to circulate copies of an email newsletter to these companies.

As in previous years, the rates of pay committee set suggested minimum rates for 2006/07 that were published in the April/May issue of *Editing Matters*, posted on the SfEP website and sent to the press. The results from the rates of pay survey were analysed in detail and posted on the website, in conjunction with a series of articles in *Editing Matters*.

publications

matthew seal

Starting Out by Valerie Rice, the booklet we launched at last year's conference, has proved popular as an introduction to the challenges of editing or proofreading as a freelance career. The SfEP office produces copies of *Starting Out* on a print-on-demand basis at a low cost. This is the way we will probably go on future booklets, as we do in printing conference and training materials.

When we contacted the ISBN Agency to obtain a retrospective number, we were surprised to learn that the Society had been allocated a batch of numbers years ago. This was beyond the memory of most of us on the council, and indeed before we had an office. You'll be pleased to know we got our new swatch of ISBNs at half price.

Other developments in the past year include council discussions on celebrating the SfEP's 20th and/or 21st birthdays. We have decided to produce a 16-page supplement of *Editing Matters* after the September 2008 conference (our 20th) and allocated appropriate funds. This will be a blend of new articles and reprints of classic material from *EM* and its predecessors.

The publications committee also considered the pros and cons of publishing a title of wider interest on the status of editing and proofreading now and in the future, either under our own imprint or through more formal channels. However, it was decided that the financial commitment needed, along with the small size of the anticipated readership, made the project unrealistic at present. Instead we will focus on providing more booklets like *Starting Out*, and plans for new titles are well advanced.

Editing Matters, under the capable editorship of Christina Thomas and her small, highly professional team, has continued to provide members with an informed mix of original articles and reviews, keeping up the masthead promise of being 'the magazine for editors and proofreaders'. More streamlined production methods have saved the Society money while the standard of content and appearance has been maintained at its high level. Our thanks to all concerned.

This year has seen the *Directory* relocate fully to the internet area (see Internet report).