



## **five-year plan**

**march 2004**

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### **SfEP mission statement**

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The SfEP's mission is:

- to encourage high standards of editing and proofreading
- to uphold the professional status of editors and proofreaders.

### **vision**

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We aim to achieve the following position within the next five years:

- the SfEP is the professional organization of choice for editors and proofreaders in the UK
- SfEP membership status and qualifications are well known and respected within the UK publishing industry
- SfEP membership status and qualifications are becoming known and respected overseas and by other UK industries and official bodies
- the SfEP is recognized within the UK publishing industry as the voice of the editorial profession in the UK
- the SfEP is gaining recognition from other UK industries and official bodies as the voice of the editorial profession in the UK.

# membership and qualifications

## membership

### Aims:

- to increase stable membership significantly
- to attract corporate associates
- to improve retention of associates
- to improve perception of SfEP as a professional body by moving existing members up the tiers

### recruitment

We currently have around 1200 individual members and associates, just over half of whom have been members for five or more years (i.e. the stable membership is around 600). We have 46 corporate associates.

#### Year one (2004)

- Target: recruit 250 new members per year
- Target: add 5 corporate associates
- Recruitment of individuals: approach the following groups: managing editors; students and graduates from colleges, e.g. West Herts, Oxford Brookes; students on commercial courses, e.g. PTC, Chapterhouse, Maple, Regent Academy [in progress]
- Recruitment of corporates: decide whether and in which order to approach the following groups: local authorities; chambers of commerce; large corporations; legal, PR, consulting firms; type-setters; web designers
- Publicize benefits of membership

#### Year three (2006)

- Target: continue to recruit 250 new members per year
- Target: add 10 more corporate associates
- Continue to approach groups in order identified in year 1
- Continue to publicize benefits of membership

#### Year five (2008)

- Target: continue to recruit 250 new members per year
- Target: add 10 more corporate associates
- Continue from year 3
- Review success with each target group and feed back to 'retention of members': different groups are attracted by different benefits

### retention of members

#### Year one (2004)

- Find out why members don't renew: send an exit questionnaire to non-renewers and/or carry out telephone interviews and analyse responses [in progress]
- Devise retention strategy based on responses to above
- Find out what members want: set up focus groups, e.g. at conference, via local groups
- Develop local group support pack, including publicity material and offer of local training

- Assess benefits already offered and investigate ways of providing more

#### Year three (2006)

- Target: increase stable membership to c.1000 individuals, i.e. retain 175 of new recruits in years 2 & 3
- Year 2: Implement retention strategy arising from exit questionnaire/telephone interviews
- Continue to investigate and provide new membership benefits
- Hold regular focus groups
- Review local group support

#### Year five (2008)

- Target: increase stable membership to c.1500 individuals, i.e. continue to retain 175 of new recruits per year
- Continue from year 3

### membership structure

Currently, about 20% of all individual members are advanced, with the other 80% split evenly between ordinary and associate.

#### Year one (2004)

- Mailshot associates of 2–4 years' standing to encourage upgrade (159 people)
- Mailshot advanced members asking for testimonials on the advantages of being advanced and publish these either in *Copyright* or in mailshots (217 people)
- Mailshot ordinary members of 5 or more years' standing re upgrade (390 people)

If 25% of these mailshots yield successful upgrades, the composition would change to 30% advanced/35% ordinary/35% associate

#### Year three (2006)

- Continue to reduce proportion of associates by promoting upgrade to ordinary
- Aim for composition of 30% advanced/45% ordinary/25% associate

#### Year five (2008)

- Keep advanced/ordinary/associate proportion stable by continuing to promote upgrades

### admissions policy

#### Year one (2004)

- Assess effectiveness of admission criteria
- Review composition of Membership Structure Subcommittee and Admissions Panel
- Consider appointment of paid personnel to evaluate courses

#### Year three (2006)

- Act on outcome of assessments in year 1
- Continue to evaluate courses

#### Year five (2008)

- Reassess effectiveness of admission criteria
- Review course evaluation

# qualifications

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## accreditation in proofreading

### Year one (2004)

Main aim: to have a full stable of fully piloted Accreditation in Proofreading tests to choose from by early to mid 2004.

- Look for people to pilot the proofreading tests currently being written
- Pilot remaining tests, amend as necessary and repilot
- Complete revision of remaining tests and make available
- Continue to develop one or more short self-administered test(s) that members can use as an indicator of whether or not they are ready for the Accreditation test

### Year three (2006)

- Launch self-test(s) in proofreading

### Year five (2008)

- Continue to administer Accreditation in Proofreading and to produce replacement tests as and when necessary

## accreditation in copy-editing

Main aim: to launch Accreditation in Copy-editing. This is expected to occupy most of the next three years, as we need to create new tests in accordance with the curriculum drawn up in 2003.

### Year one (2004)

- Advertise for and appoint paid personnel: project manager and test writers
- Project manager and test writers start work
- Pilot the first test, amend as necessary and repilot
- Start search for potential examiners to take the test

### Year three (2006)

- Start training examiners (2005)
- Look for people to pilot remaining tests (2005)
- Pilot remaining tests, amend as necessary and repilot (2005–6)
- Launch Accreditation in Copy-editing in 2006, if necessary with less than the full stable of tests
- Investigate the feasibility of a self-test or tests comparable to the self-test(s) in proofreading

### Year five (2008)

- During 2007, if necessary, complete revision of any remaining test(s) and make available
- Continue to administer Accreditation in Copy-editing and to produce replacement tests as and when necessary
- Start developing self-test(s) if considered feasible

## registration

### Year one (2004)

- Continue to administer status quo

### Year three (2006)

- Review and possibly revise requirements

### Year five (2008)

- Continue from year 3

## other activities

### Year one (2004)

- Continue (through Accreditation, Registration and Membership Subcommittee, ARMSub) to investigate the practicalities and consequences of administering the proofreading test to employees of corporate associates, using LexisNexis UK as pilot
- Work with the Membership Committee (through ARMSub) to devise a clear explanation of the relative status, benefits and routes to the various qualifications and levels of membership currently available
- Encourage higher take-up of Accreditation and Registration: send a questionnaire to all ordinary members and associates [currently in progress], analyse responses and act on them

### Year three (2006)

- Implement policies agreed in year 1
- Keep the above under review and discuss change if necessary
- Consider further developments such as an on-screen editing test and subject-specific tests
- Take advantage of accumulated knowledge and experience of on-screen work from the mentoring in copy-editing scheme

### Year five (2008)

- Implement further developments agreed in year 3
- Keep the above under review and discuss change if necessary

# communications

## publicity and marketing

### for the society

#### Year one (2004)

- Implement marketing campaigns agreed with freelance contractor for one-day conference, advertising in newsletter, selling subscriptions to newsletter
- Assess success of campaigns and decide on next targets
- Place editorial in appropriate media
- Find out about and attend conferences and other events to promote SfEP

#### Year three (2006)

- Continue marketing campaigns and expand to include in-house training
- Place editorial in appropriate media
- Continue to attend conferences and other events

#### Year five (2008)

- Continue marketing campaigns
- Place editorial in appropriate media
- Continue to attend conferences and other events

### for the profession

#### Year one (2004)

- Investigate ways of setting up rapid-response system to respond to articles and comments in media and highlight examples of bad editorial practice
- Attend conferences and other events
- Research demand for in-house training courses
- Maintain contact with corresponding organizations

#### Year three (2006)

- Have rapid-response system up and running
- Increase number of corresponding organizations
- Extend collaboration with other organizations
- Attend conferences and other events
- Promote in-house training courses

#### Year five (2008)

- Respond to articles in media
- Campaign proactively on issues affecting the profession
- Attend conferences and other events
- Promote in-house training courses

### for individual members

#### Year one (2004)

- Increase awareness of the *Directory*: Decide whether and in which order and when to approach the following groups: local authorities; chambers of commerce; large corporations; legal, PR, consulting firms; typesetters; web designers
- Set up job exchange for associates [achieved]

- Investigate ways of marketing the services of different levels of membership, especially advanced members, without being divisive

#### Year three (2006)

- Continue to increase awareness of the *Directory*
- Continue to market services of advanced members and other groups, including placing articles in appropriate media
- Evaluate effectiveness of job exchange for associates

#### Year five (2008)

- Continue from year 3

## internet

The main areas of SfEP internet activity are currently:

- website ([www.sfep.org.uk](http://www.sfep.org.uk)), including online *Directory*
- SfEPAnnounce, SfEPLine, SfEPMedical and SfEPLegal
- internal closed discussion groups such as SfEPCouncil and SfEPLocal
- sfep.net e-mail addresses for advanced members
- online advertising via Google AdWords
- online income generation via Amazon Associates and Viking
- unused domain names (e.g. [www.editors.org.uk](http://www.editors.org.uk), [www.sfep.co.uk](http://www.sfep.co.uk)) that divert automatically to the main website

#### Year one (2004)

- Appoint a designer to rebuild and modernize website [in progress]
- Make available online booking forms for membership, conferences and all training courses
- Consider whether other forms can be made available online
- Implement high-priority requirements of Society's committees
- Compile a comprehensive and annotated reference list of aids (websites, books) for general editing – possibly with user reviews
- Make available basic FAQs – on proofreading, editing and the SfEP – developed by the Publications Committee
- Research and produce specification for updatable online *Directory* [in progress]
- Ensure 90% of links are accurate

#### Year three (2006)

- Internet is primary means by which 50% of new and existing members and associates interact with the Society: all forms available online
- Explore possibility of online payment for membership and training courses
- Implement medium-priority requirements of Society's committees
- Review special interest groups (SfEPMedical, SfEPLegal) and consider whether more should be set up

- Update and expand reference list
- Explore possibility of making sample material for courses available online
- Make available further FAQs as developed by the Publications Committee
- Explore possibility of online self-tests
- Ensure 90% of links are accurate

#### **Year five (2008)**

- Internet is primary means by which 90% of new and existing members and associates interact with the Society
- All training courses and membership can be booked and paid for online
- Implement all requirements of Society's committees
- Review special interest groups
- Update and expand reference list
- Make full range of FAQs available
- Have online self-tests available
- Explore possibility of remote-learning courses
- Ensure 90% of links are accurate

## **publications**

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### **newsletter**

#### **Year one (2004)**

- New editor in place
- Hold competition for new name for newsletter [in progress]
- Implement agreed advertising strategy
- Sell subscriptions to retiring members and other interested parties

#### **Year three (2006)**

- Review advertising strategy
- Increase number of pages per issue from 16 to 24
- Aim for 30% increase in revenue compared with year 1
- Continue to broaden subscription base

#### **Year five (2008)**

- Continue from year 3

### **Directory**

#### **Year one (2004)**

- Appoint new editor to take over in October 2004
- Produce 2005 edition in same way as 2004
- Research updatable online database for 2006 edition

#### **Year three (2006)**

- New production system in place in year 2
- First edition produced from updatable online database

#### **Year five (2008)**

- Evaluate production method
- Third edition produced from updatable online database

### **booklets and FAQs**

#### **Year one (2004)**

- Complete list of potential titles with means of financing worked out
- Create basic FAQs on proofreading, copy-editing and the SfEP, for publication on website and in print
- Identify further areas where FAQs are required

#### **Year three (2006)**

- 2 booklets published
- More FAQ areas covered on website

#### **Year five (2008)**

- 5 booklets published
- Ensure all FAQ areas are covered

### **Code of Practice**

#### **Year one (2004)**

- Revision (2nd edn) complete
- Promote to membership as indispensable working tool

#### **Year three (2006)**

- Continue to promote to membership

#### **Year five (2008)**

- Assess whether further revision due

### **internal publications**

#### **Year one (2004)**

- Revision of information pack completed
- Make available online booking forms for membership, conferences and all training courses
- Consider whether other forms can be made available online

#### **Year three (2006)**

- All internal documents reviewed and at least 50% completed
- All forms available online

#### **Year five (2008)**

- All internal documents reviewed and improved as necessary; cycle begins again

### **other publishing projects**

#### **Year one (2004)**

- *Copy-editing* 4th edn: contract signed, revision under way
- *Oxford Spelling Manual*: revision under way

#### **Year three (2006)**

- *Copy-editing* 4th edn: published with prominent acknowledgement to and/or endorsement by SfEP
- *Oxford Spelling Manual*: published with prominent acknowledgement to SfEP
- Investigate further opportunities for collaborative publishing projects

#### **Year five (2008)**

- Further collaborative publishing projects under way

# training and conferences

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## training

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### training and mentoring for members

#### Year one (2004)

- Have mentoring in copy-editing well established
- Introduce training voucher scheme for associates [achieved]
- Consider offering training in other centres, e.g. through local groups

#### Year three (2006)

- Keep the above under review and discuss change if necessary
- Encourage the upgrade of associates to ordinary membership by promoting training through the voucher scheme
- Run courses in other centres identified in year 1
- Consider what new courses could be offered

#### Year five (2008)

- Review existing courses and revise if necessary
- Develop new courses identified in year 3
- Consider expanding beyond one-day courses

### training for others

#### Year one (2004)

- Establish ground rules for agreeing conditions with training clients, and routine procedure for three-way communication between training director/co-ordinator, tutors (who manage tailoring and timetabling) and clients
- Start in-house training under SfEP umbrella for corporate associates who have already expressed interest
- Deliver the first in-house course(s) under the SfEP umbrella to non-associate, non-publishing clients (if any of current enquiries come to fruition)
- Start to build up a body of tutors qualified to deliver courses tailored to corporate clients

#### Year three (2006)

- Keep the above under review and discuss change if necessary
- Set up targeted search to identify wider possible markets for in-house training in (probably) proofreading, grammar, web editing, e.g. local government, large corporations with annual graduate intake, large charities
- Increase number of in-house training courses in response to incoming enquiries
- Continue to build up body of qualified tutors

#### Year five (2008)

- Start in-house training courses for organizations identified in years 3 and 4
- Be one of the recognized providers of training in proofreading, grammar and web editing outside publishing as well as within it

- In addition to covering costs of our own courses for our own members, be generating income for the Society through the provision of in-house training to outside bodies

## conferences and road shows

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Conferences are linked with road shows and the two will need to develop together. A road show is a locally targeted event for non-members and members of a particular area; conferences target the whole membership, even if only one section of it at a time.

### annual conference

#### Year one (2004)

- Continue in the current form

#### Year three (2006)

- Continue in the current form with some natural development

#### Year five (2008)

- Continue in the current form with some natural development
- Reassess the format of the annual conference

### supplementary conferences

These will be one-day events, probably targeting particular groups, e.g. medical editing, web editing, illustrated books. Attendance 30+(?), costs lower than annual conference, no accommodation provided (but places suggested to support networking).

#### Year one (2004)

- Explore interest of corporate associates and non-associate publishers in one-day corporate events [in progress]
- Produce a shortlist of possible one-day specialist events for individual (freelance and in-house) delegates
- Find 'key' people in SfEP for these areas who can provide information on who might attend, topics of interest, etc.
- Explore possible sponsors of one-day conferences
- Run one event
- Summarize the results

#### Year three (2006)

- If event in year 1 is successful, have annual event up and running
- Explore the possibility of joint events with other organizations, e.g. Institute of Scientific and Technical Communicators (ISTC), Society of Indexers, European Association of Science Editors (EASE), Medical Journalists' Association (MJA); identify other suitable organizations
- Prepare a timetable and set up events for years 3–5

- Develop a pilot 'introduction to freelancing/publishing' half-day event, to be marketed to job/business creation schemes

#### **Year five (2008)**

- Hold one or two annual specialist one-day events (for specialists from the whole membership; possibly also non-members)
- Have sold one or two 'introduction to freelancing/publishing' half-day events to job/business creation schemes, e.g. local enterprise schemes (non-members, corporates, local members)

### **road shows**

#### **Year one (2004)**

- Produce outline plans for a local talent-based road show (LT) and a national talent-based road show (NT)
- Devise two outline road show formats, one full-day, one half-day, and make a rough costing for LT and NT
- Find out whether each local SfEP group is interested in principle; how many from the group might attend; whether there are local non-member groups who might attend; whether they prefer the whole-day or half-day format; what price members would pay

- Choose three locations, e.g. Glasgow, Bristol, Exeter, and approach the local chamber of commerce, council, enterprise board to gauge interest in attending/support funding and for contacts with other local organizations
- Consider three areas with members but no local group and do a feasibility study as in 3 above
- Summarize the results

#### **Year three (2006)**

- Based on the year 1 summary, produce one road show plan, make a cost estimate and get it into budget (2005)
- Trial the road show in three locations (2005)
- Analyse data from trial to assess feasibility and cost effectiveness of road show format
- If outcome is positive, produce a modified road show plan and start planning expansion

#### **Year five (2008)**

- Aim to have a system up and running or to have excluded it as an immediate aim

# finance and administration

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## financial position and planning

For current financial position see Financial Statements for the year to 29 February 2004.

### Year one (2004)

- Assets: two computers, printer, fax machine, furniture, telephone system, other miscellaneous equipment
- Projected income: £250,000
- Forecast spending for the next five years, including publications, training development, Accreditation development, conferences, office staff and accommodation requirements

### Year three (2006)

- Assets: as year 1, plus additional computer and printer, desk
- Projected income: £300,000

### Year five (2008)

- Assets: as year 3
- Projected income: £350,000

## corporate structure

### Year one (2004)

Structure established for medium term:

- Company limited by guarantee
- Setting up of subsidiary companies (e.g. SfEP Training Limited, SfEP Publications Limited) ruled out on grounds of additional cost and work

### Year five (2008)

- Reassess need for subsidiary companies for training and/or publications

## premises and employees

### Year one (2004)

#### Premises

- Move to larger accommodation, preferably within the present building [done in Jan 2004]
- Install additional phone line [done in Jan 2004]
- Transfer accounting and other records, training records and archives to the office
- Transfer administration of training and admissions to the office [in progress]

#### Employees

- General Secretary – full-time
- Book-keeper/Admin Assistant – part-time
- Admin Assistant – part-time

#### Suppliers

- Issue contracts for services to all providers of services, with schedules of work and payment therefor, to be reissued annually or whenever the rates are reviewed
- Standardize rates paid for same types of work

### Year three (2006)

#### Employees

Two or possibly three full-time employees:

- Book-keeper/Admin Assistant to become a full-time job, leaving Finance Director free to deal with forecasts and financial planning
- Consider reorganization of secretariat and appointment of full-time employee with secretarial skills

#### Suppliers

- Get quotations within two years with aim of using one supplier for all printing/publications: stationery, publicity, conference/training folders, membership information, possibly *Directory*

### Year five (2008)

#### Employees

- Consider appointment of Chief Executive Officer

## council and voluntary posts

### Year one (2004)

- Council of 12 elected members who are directors of the company
- Four committees, each of three directors: Membership (Membership Secretariat, Benefits, Admissions, Qualifications); Communications (Publications, Internet, PR, Recruitment); Training (Training, Mentoring, Conferences), Finance & Administration (Chair, Vice-Chair, Finance Director/Company Secretary)
- Support provided by subcommittees and working parties as required
- Consider paid secretary to Council or other support

### Year three (2006)

- Consider whether further support to Council needed

### Year five (2008)

- Provide for purchase of badge of office for Chair: investigate sponsorship
- Consider 'official' badges for Council members

## honorary posts

### Year one (2004)

- Honorary President
- Consider and approach candidates for new post of Vice-President
- Other Honorary Members: 3 (limit of 10)

### Year three (2006)

- Honorary President
- Vice-President appointed
- Other Honorary Members: 3+ (limit of 10)
- Consider increasing maximum number of Honorary Members as membership grows

### Year five (2008)

- Honorary President
- Vice-President
- Other Honorary Members: probably more than year 3 (limit possibly increased)