

4 Professional practice of the client or manager

This section covers the process by which editorial work is placed by a client or manager.

4.1 Briefing and handover

4.1.1 Initial contact The client should provide an accurate initial description of the job to be placed, followed by a clear and comprehensive brief. The brief may be written or spoken, although a written brief is preferable. Where no written brief is forthcoming, suppliers are advised to confirm their understanding of the brief in writing. Clients should recognise that suppliers reserve the right not to accept work.

4.1.2 Nature of the work The brief should set out:

- the nature of the projected work
- the extent of contact between supplier and author or other contributors
- the name of the in-house contact.

A copy of the client's house style (where applicable) should also be supplied. The brief should also include the following details.

a The level of edit to be carried out (see **5.1.3**) and the scope and nature of the work to be performed on the document (eg resolution of ambiguities, illogicalities and anomalies of style; editorial changes to take account of contractually specified length).

b Any specific requests from the author and any comments from expert readers (eg attention to language level).

c Style and design to be followed (eg for consistency with related house works and series or pages elsewhere on a website), including electronic codes, tags or styles to use if appropriate. *Note:* Copy-editors expect to mark up for an educated native speaker of the language in which they are working, so if this is not the case it is important to make this clear at brief stage.

d Style to be used for specific parts of the work as applicable (eg captions, tables, mathematics, references, appendices, glossaries, links).

e Instructions for the presentation and listing of illustrations (photographs or half-tones, maps, diagrams, other artwork) and multimedia (animations, audio files, video files, interactive elements), and for the presentation of briefs for these, including labels on electronic files.

f Instructions for listing items needing permissions and acknowledgements, and for handling these.

g A list of any undelivered material (eg preface or foreword).

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- 4.1.3 Schedule** The client should specify the schedule for the job, allowing sufficient time for the requirements of the brief to be carried out. The schedule should take into account any undelivered material and include an expected delivery date for this material.
- 4.1.4 Market requirements** The brief should give details of the intended market and readership, any projected foreign editions and any related house works, series, electronic media or websites.
- 4.1.5 Presentation of the manuscript** The client should provide a complete manuscript; if the supplier is to work on hard copy, the client should provide a clean print-out using double spacing and appropriate margins; any electronic files supplied should correspond to the hard copy. *Note:* The presentation of work in the form of a high-quality typescript or print-out does not necessarily imply a high-quality product.
- 4.1.6 Security** The client should ensure that all electronic files supplied have been virus-checked. In addition, as a further precaution, the recipient should virus-check the electronic files.

4.2 Working agreements and fees

- 4.2.1 Agreement of terms** The client should set out clearly the terms agreed (see **3.2.1**).
- 4.2.2 Negotiation and estimates** The client should endeavour to give accurate estimates of the level or type of work and amount of work involved; it is helpful if the client indicates how such estimates are arrived at. The supplier has the right to negotiate staged payment or fee (or part-fee) in advance if appropriate and to have included in the fee an allowance for reasonable time spent assimilating the brief, writing up handover notes, attending meetings, and so on.
- 4.2.3 Changes in circumstances** The client should inform the supplier of any changes to schedules and may negotiate further (in terms of budgets or schedules) in the light of material changes in the circumstances of the job.
- 4.2.4 Prompt payment** The supplier shall expect to receive payment within a specified time, agreed in advance, from submission of the invoice or within 30 days, as set out in the Late Payment of Commercial Debts (Interest) Act 1998 – Amended and Supplementated in 2002.
- The client should be aware that the supplier has a statutory right to interest and compensation in the event of late payment.
- 4.2.5 Indemnity** It is the responsibility of the client to insure against all loss of or damage to all artwork, photographs, manuscripts, disks and marked proofs while in transit between client and supplier and while in the supplier's keeping. Where appropriate (eg in the case of manuscripts and disks), the client will keep copies for at least six months after publication. It is the supplier's responsibility to keep copies of electronic files, author queries and correspondence relating to the work, also for at least six months after publication.
- 4.2.6 Legal issues** The client bears ultimate responsibility for matters relating to libel, obscenity, blasphemy, incitement to racial hatred, plagiarism and the reproduction of copyright material belonging to third parties.

4.3 Working relationships with editors and authors

Where applicable, the client should have agreed the terms of the brief, the level of copy-editing required and the schedule requirements with the author.

4.4 Loyalty and confidentiality

Clients should be aware of their responsibilities with respect to personal data under the Data Protection Act 1998.

The client should recognise that a supplier who is fulfilling his or her editorial obligation is acting as the client's representative, and has the right to expect the client's reasonable support in relations with the author and others in the publishing process, particularly in the event of any dispute.

The client should respect the confidence of the supplier.

4.5 Feedback

The client should be prepared to give constructive feedback to the supplier and to accept that one function of such feedback is to inform both parties about the level of success of the briefing process; as such, it is instrumental in initiating and maintaining a good relationship between client and supplier.