

6 Standards of editorial project management

6.1 Scope

- 6.1.1 Brief** The project manager should, in discussion with the client, first define carefully the boundaries of his or her responsibility and obtain a brief. The project manager will need to carry out (or subcontract) many or all of the tasks listed in sections **6.2** and **6.3**, but not all of these will be required in each case and the order of work may vary. The precise scope of editorial project management varies widely from client to client, and even from project to project. When a project manager is also the project copy-editor and/or proofreader, the relevant elements of section **5** apply.
- 6.1.2 Schedule and budget** It is the project manager's responsibility to ensure that the schedule and budget are adequate for producing a work of a stated quality, and to inform the client immediately of any shortcomings and their implications.
- 6.1.3 Communication** It is the project manager's responsibility to keep in contact with the author(s), volume editor(s) or web editor/developer throughout the project and to keep copies or records of correspondence and supporting material.

6.2 Processes involved: printed materials

6.2.1 Initial checklist

- a Evaluation** Inspect the received materials (hard copy and/or electronic typescript) to determine whether they are complete and conform to the contract and synopsis or to the client's stated requirements in all respects, including adequately addressing the subject, clear structure, accuracy and readability.
- b Content** Check the overall length of the whole work, including references, illustrations, tables, index, prelims and other elements. Check that the presentation of materials conforms to the requirements of the determined production processes: that hard copy is clean and double spaced, that electronic files are compatible with the systems to be used and that the hard copy matches the electronic files.
- c Irregularities** Inform the client of any omissions or deviations from the agreed brief, especially regarding estimated extent, and recommend action.
- d Permissions** Ensure that text and illustration permissions are sought, and that accurate acknowledgements are prepared in accordance with the terms and conditions of the permissions.
- e Level of copy-editing** Assess materials to determine the level of copy-editing required (see **5.1.3**) and to ensure that the schedule and budget remain adequate.
- f Assemble a team** Determine what jobs need to be done throughout the project and which ones will be delegated. Choose people with the relevant skills and equipment for all the delegated tasks, contact them a reasonable length of time in advance, negotiate fees within the budget, confirm the schedule for each job, and brief all team members and supply them with the necessary materials to enable them

to do their jobs to the required level of quality. Keep each member of the team informed of any alterations to the schedule throughout the duration of the project.

g *Revisions* Ensure that suggested changes are agreed with the author(s).

h *Prelims and endmatter* Ensure that these are compiled and arranged in the correct order.

6.2.2 Illustrations

a *Picture research and artwork* Ensure that the picture researcher, any other researcher and/or illustrators are briefed.

b *Illustrations* Ensure that all illustrations required are supplied, have the correct editorial content, and are checked for quality for reproduction.

c *Photography* Brief the photographer, and oversee the photo shoot if required.

d *Captions and legends* Ensure that the illustrations are correctly captioned and, where relevant, acknowledged in accordance with the conditions laid down by the copyright and/or material owner.

e *Originating illustrations* Send all electronic files, transparencies, monochrome prints and line artwork to the originating house or pass to the client's production department.

6.2.3 Copy to typesetter or designer

a *Marking up* Ensure that the text is coded/tagged for setting, on hard copy and/or electronically. Check whether the typesetter will be a native speaker of the language of the project and, if not, make appropriate allowance.

b *Designer's brief* Brief the designer or typesetter on the layout required and on any style details deviating from those already agreed.

c *Complete document* Ensure that the materials are complete, from prelims to endmatter, and arrange typesetting or deliver the materials to the client's production department.

d *Jacket or cover copy* Where applicable, prepare cover copy and arrange for cover design. Ensure that a draft copy is seen by everyone specified by the client.

6.2.4 Proofs (text plus illustrations)

a *First proofs* Ensure that the proofreader, author(s) and any other readers required by the client receive a set of first proofs.

b *Illustration proofs* Ensure that all artwork is checked against original artwork briefs, that labels (annotations) are proofread and that colours are used appropriately. Check photo proofs, which may also have to be approved by the copyright and/or material owner.

c *Collation* Ensure that corrections are collated onto the marked proofs (see **5.7**).

d *Return of proofs* Return the marked proofs, ensuring that the typesetting package is complete.

e *Subsequent proofs* Ensure that all amendments requested at the previous proof stage have been made correctly and that any material set since then is proofread.

6.2.5 Index and other endmatter

- a *Index* Ensure that the index has been prepared, edited and marked up for setting and that it is sent to the typesetter, proofread and corrected on schedule.
- b *Endmatter* Ensure that any other matter, such as a new appendix, is marked up and is sent to the typesetter, proofread and corrected on schedule.

6.2.6 Management

- a Monitor each job at key stages to ensure that it is adequately prepared, and take any necessary action to correct errors, omissions and other shortcomings.
- b Monitor all work to ensure that it is completed on time, within budget and to the required quality.
- c Warn all team members of potential delays and work with them to prevent or minimise the problem.
- d Warn the client's sales and marketing department immediately if delay is unavoidable.
- e Initiate and maintain communications with all personnel involved in the project.
- f Provide constructive feedback to all members of the team.

6.3 Processes involved: web content

It is often a good idea to bring together the writing, editing and design team members at the beginning of a project to ensure that everyone understands what is required and the final goal.

6.3.1 Initial checklist

- a *Evaluation* Evaluate the content supplied in terms of the client's requirements – for adequately addressing the subject, for clear structure and for accuracy and usability. Bear in mind the range of users who will be accessing the site and identify any age, language, cultural or other barriers – such as physical or learning disability – to understanding and accessibility.
- b *Structure* Create a structure for the site, preferably in conjunction with the editor. Use graphic representation (eg wireframes) to test out initial ideas and, if possible, carry out early usability testing with a few individuals.
- c *Content* If updating an existing site, on receipt of the URL, check that the site is working, whether it is clear which (if any) software or plug-ins are required to access multimedia elements and that all such files are available. Confirm with the client what hardware and software the likely audience for the site will have, and make sure that the web design is informed by that. Be aware that alternatives to multimedia files may have to be provided; eg images in place of an animation, text as well as or instead of an image. Commission the required text.
- d *Permissions* Ensure that text, image and other permissions (eg for audio or video) are sought, and that accurate acknowledgements are prepared in accordance with the terms and conditions of the permissions.
- e *Level of copy-editing* Assess materials to determine the level of copy-editing required (see **5.1.3**) and to ensure that the schedule and budget remain adequate.
- f *Editing* Agree on how this will be done; for example, using original text or Word files, an html editor, web design software or a content management system (CMS).

Allocate editing by agreement with the client. Ensure that the editor has the necessary skills, connectivity, hardware and software, and virus protection.

g *Updating and upgrading* Discuss with the client suggested changes to the style guide, page templates or navigational controls.

6.3.2 Multimedia

a *Image research* Find out whether the client has access to an image bank and if (and how) editors, designers and others can access it. Alternatively, brief a picture researcher, any other researcher and/or an illustrator for preparation of graphics and other multimedia items. Confirm that, because the images will be used on a website, they need only be of a relatively low resolution. However, check whether the client also requires high-resolution images for print purposes, eg marketing materials.

b *Captions and legends* Ensure that, if necessary, images are correctly captioned and acknowledged in accordance with the conditions laid down by the copyright owner and/or image owner.

6.3.3 Copy to designer

a *Designer's brief* Brief the designer on the layout required and on any style details already agreed with the client.

b *Page designs and site structure* In conjunction with the designer, ensure that web page designs and the site structure and navigation are approved by the client.

c *Accessibility* Liaise with the designer on issues of accessibility to multimedia content – eg to make content accessible to users with sensory or motor disabilities. This is a legal requirement (Disability Discrimination Act 2005).

6.3.4 Proofreading and validation

a *Proofreading* Ensure that the proofreader and any other readers (eg author) required by the client receive the html files or are directed to a private URL, as appropriate.

b *Collation* Ensure that corrections made by the author and others to text, graphics and dynamic or interactive features are collated into the final version (see 5.7). Make sure that the designer can understand what the amendments mean (eg if BSI proof-correction marks have been used).

c *Subsequent proofs* Ensure that all amendments requested at the previous proof stage have been made correctly, that the pages are complete and that any material added since then has been proofread. In particular, check navigation, headings, links, and the positioning, size and functionality of multimedia elements.

d *Validation* Ensure that the proofreader has examined the website using at least three different (popular) browsers and, ideally, both PC and Apple Mac computers, making sure that, within limits, all elements of the site work as intended.

6.4 Skills required

In order to carry out editorial project management efficiently and effectively, a project manager should be competent in the following skills.

6.4.1 Restructuring Recognise when work needs restructuring. Suggest cuts and additions where necessary, or provide guidelines for the author to cut or add. Ensure that the length of the work is as specified. Recognise when prose material would be better

presented in another format (eg table, diagram, bulleted or numbered list, animation) or vice versa. Make comprehensive notes and discuss changes with the author, or provide a list of queries for the client.

- 6.4.2 Copy-editing** Copy-edit or, with the client's agreement, allocate to a copy-editor of known competence, ensuring that house style if appropriate is followed.
- 6.4.3 Design and production** Be familiar with the skills and requirements of others involved in the production process. Have a good working knowledge of that process, including, as appropriate, typesetting, picture origination, printing, web conventions and use of electronic tools including web design software, and be aware of the capabilities of standard multimedia authoring programs. Be aware of the implications of cuts or additions at book and journal proof stages.
- 6.4.4 Proofreading** Proofread or allocate to a proofreader of known competence.
- 6.4.5 Permissions** Recognise what is likely to be in copyright; know how to request permission to use copyright material in print and electronic formats; ensure that credits are correctly stated.
- 6.4.6 Costs and schedules** Be aware of costs, including cost implications of design requirements over and above those already budgeted for. Know the possible consequences of delays to the schedule (costs; time-collision with other projects, both client's and supplier's; sensitivity to the market).

6.5 Liaison with authors

To ensure the smooth running of the project, the project manager must be available to attend to the following.

- 6.5.1 Liaison with the client's author** If required by the client to do so, liaise with the author during the period of writing or compiling the text. Respond to requests for help in tackling specific problems or general questions of coverage and organisation. Monitor progress and ensure that the author is aware of both schedule requirements and those relating to presentation of material; notify the client if the deadline seems in danger of being missed.
- 6.5.2 Agreeing changes** Discuss all significant changes to the text, illustrations and dynamic or interactive elements and secure the author's acceptance or refer to the client.
- 6.5.3 Author's special requirements** Ask the author to specify any special requirements for the design and/or treatment of illustrations or other multimedia, their relative sizes and positions etc.
- 6.5.4 Proofs** Ensure that the author receives copies of proofs or access to web pages at appropriate stages and give guidance on the appropriate procedure for requesting changes, if required.
- 6.5.5 Collation** Deal with any queries and collate the author's corrections onto the marked set or proofed page, minimising the cost of alterations wherever possible in discussion with the author. Secure the author's acceptance or refer to the client.
- 6.5.6 Blurb** Where applicable, secure the author's acceptance of blurb or refer to the client.
- 6.5.7 Disagreements with an author** If a difference of opinion with an author regarding the text or other elements remains unresolved at any stage of production, bring this to the client's attention before the text proceeds to the next stage.

6.6 Liaison with others

Direct contact with others involved in the production process (author, editor, designer, illustrator, typesetter, web developer, webspinner) may be essential, and close contact between them highly desirable, throughout the execution of the brief. The client should be expected to introduce team members to one another as appropriate, at the earliest opportunity. Thereafter it is up to the project manager to build up a productive working relationship. As close to the outset of the project as is feasible, an appropriate method should be devised to monitor the progress of the work and to ensure that all participants deliver on time and within budget.