IP Ed.

To advance the
profession of editing

PROJECT FOR TRANSITION OF IPEd MEMBER SOCIETIES TO THE DIRECT MEMBERSHIP MODEL

COMMUNICATION WHITE PAPER

SEPTEMBER 2015

Team members: Rosemary Noble, (Vic), team leader; Miranda Roccisano (SA); Deborah Singerman, NSW; Sue Pavasaris, ACT; Iaan Wiltshire, Vic; Zoi Juvris, Vic; Denise Holden, NSW (retired); Rebecca Harris, Qld (retired), Katy McDevitt, SA (retired); Mary-Anne Came, IPEd Communication Officer

IPEd TRANSITION WHITE PAPER - COMMUNICATION

EXECUTIVE SUMMARY

The Communication project team of WP4 was set up with the following objectives:

- define the communication channels and methods the national organisation will employ to communicate with members, branches, industry and the general public
- define the nature of information to be disseminated through these channels and the frequency of publication
- recommend processes for transition from the current member society communication models to the national communication model.

Surveys of members were distributed during 2014 to gather data on each society's views on both their own and IPEd's websites, newsletters and social media channels. As one of the core aims of IPEd has always been to share information in a more equitable way, it is not surprising that members endorsed a unified approach to future communication.

While strongly supporting a single national website, society members were reluctant to relinquish their own local fora for news and events. The same is true of newsletters and social media accounts. Therefore this paper recommends strong, open centralised communication, while still providing space and flexibility for each branch to keep a strong identity and individuality with dedicated spaces within the centralised website or newsletter and the ability to send out branch-specific bulletins if required.

Under the agreed more gradual approach to the transition, it was felt even more strongly that a more detailed communication plan should be developed as the domain of the new IPEd administration. The existing structure of separate newsletters, websites and social media channels can continue in its current form and gradually evolve into a more unified communication strategy, both for the information of editors themselves and our clients. The employment of a professional Communication Officer under the direction of the Executive Officer would expedite this.

In the meantime, in the initial stages of the transition, branch website officers should work together to migrate relevant material from individual society websites to the IPEd site and develop a brief for a future web developer to design a single central site with branch subsites. From the outset, the IPEd site will link to the IPEd membership portal, event registration and access to members-only resources.

Members need to agree on the recommendations in this paper before a truly practical communication policy can be developed.

IPEd TRANSITION WHITE PAPER - COMMUNICATION

INTRODUCTION

While the previous version of this paper appeared to cover the communication aspects that editors are concerned with, they felt that a much greater emphasis should be placed on advocacy for the profession. We agree that this is a high priority, but we believe that development of a truly effective advocacy plan requires the services of a marketing professional working closely with existing communication officers from each society and IPEd.

The following paper is divided into six sections:

1. General communication
2. Advocacy
3. Websites
4. Newsletters and magazines
5. Social media
6. Other issues
   a. Branding
   b. Publishing

1. GENERAL COMMUNICATION

From the beginning of this transition process, two of the main advantages seen by members for going to a direct membership model (DMM) was more effective sharing of information and resources and the development of a strong national advocacy policy. Each society and IPEd itself have well-developed communication policies and procedures, so future integrated policy will draw on the best of these existing policies. Advocacy in a coordinated manner is not possible in the current structure, so this policy will require more focused attention from the new Executive Officer once transition is achieved. Future policy must also address industrial relations issues such as pay rates, contracts, and self-publishing.

In the transition process, in the short term, the new communication policy can be seen as being of a lower priority than matters being raised by the Legal & Governance, Finance & Operations and Membership teams. Together with professional development issues, integration of a more unified communication policy can remain largely aspirational until after the outcome of the forthcoming vote is known. If the DMM is voted in, new policy will gradually evolve under the auspices of the new regime.

During the data-gathering stages of this process, societies were surveyed on their current policies. These largely concentrated on internal communication; that is, keeping their own members informed about society activities. Little or no emphasis was placed on external communication to our members' clients, the publishing industry, government and the wider community in general.

External communication and promotion

The principal aim of IPEd has always been to advance the profession of editing, reflected in several of its core functions. This desire for wider recognition of the skills, expertise and necessity of good editing has also been frequently cited as the

single most compelling reason for our becoming a truly national body rather than a group of disparate local societies.

In order to fulfil this desire, we need to

- develop a targeted program of communication and promotion to our existing and potential clients
- develop strategic relationships with associated organisations such as indexers, authors, writers centres
- monitor and re-publish media items on relevant issues
- brief the Communication Officer or a councillor as a public intellectual to be available to comment and advocate for the profession in the media

If we do not have the requisite public relations expertise within our ranks, we should employ a professional to help us to set up such a program so that external communication and promotion becomes the highest priority of a future communication policy.

2. ADVOCACY

As indicated by the recent *IPEd National Survey of Editors 2014*, a majority of editors expect IPEd to be able to assist them in the conduct of their businesses in areas such as:

- Rates of pay
- Contract negotiation
- Employment brokerage
- Insurance
- Gathering data from relevant government agencies and unions such as the Media, Entertainment and Arts Alliance (MEAA) regarding working conditions and job outlooks for editors and editorial services
- Higher level advocacy such as lobbying for involvement in the development of an updated Style Manual
- Working with government departments and corporations for recognition of accreditation of editors
- Developing close ties with tertiary institutions to encourage involvement of IPEd as the peak editors' body in the development of their editing programs.

In order to develop an effective program of advocacy in the above areas, the new IPEd administration will need to develop strong relationships with professionals in legal, financial, educational and industrial fields, and, as mentioned earlier, ensure that the development of such policy is a high priority for the Executive Officer.

3. WEBSITES

A survey of members of the societies of editors was undertaken to determine their use of society websites. In summary:

- Those who visit their society's site on a regular, frequent basis are also likely to visit the IPEd site on a regular, frequent basis. These sites are not visited frequently by the majority of members.

IPEd TRANSITION WHITE PAPER - COMMUNICATION

- The website is seen as the primary communication tool both for sharing resources and information among members and as a promotional tool for external clients.
- Respondents were overwhelmingly in favour of a single site with information open and available to all members, irrespective of location or branch affiliation. Each branch would be able to contribute news items to a dedicated section within the main site, but all advertising of events and training, together with registration, would be integrated.
- A members-only area would need to be maintained to enable individuals to view and change membership details and access internal documents such as the constitution, code of ethics, policies and procedures.
- Most agree that the current IPEd website is uninteresting and ineffective as the primary communication tool of the organisation. A web developer with the necessary technical expertise should be employed to take the best of the current websites and develop a structure that addresses the aims, target audiences and technical functionality of the site, while an information architect designs the most effective navigation. Current society websites contain a great deal of important and relevant information, much of which could be migrated to the central site. Individual branches could retain pages for their own local news and events.

The aim of the new IPEd website is the same as the aim of IPEd: to promote editing and advance the editing profession. As the primary communication tool of the peak body representing editors, the website should also:

- be a leading information source about the editing profession
- communicate with IPEd members about events, news and professional development information via an online dynamic calendar
- promote IPEd membership to non-members
- house the Editorial Services Register (via MemNet)
- share information about freelance assignments, contract roles and jobs
- maintain a library of training resources
- manage resources for and promote IPEd's accreditation and mentoring programs
- promote and sell IPEd publications

Target audiences for the IPEd website
- IPEd members
- Employers of editors, including publishers, communication professionals and other users of editorial services
- Editors who may be potential members of IPEd
- Students of editing

- Other professionals who might be considering a career change to editing or who may do editing as part of another role
- Members of sister organisations overseas (eg. SfEP UK, PEG South Africa, EAC Canada).

Public information on the site

The IPEd website should include information that is publicly available and of interest to a broad target audience such as:

- Information about what editing is and the editing profession, in particular *Australian Standards for Editing Practice,* as well as other documents developed by societies for the information of their members and clients (guides to editing levels, guidelines for editing theses, contract samples, quoting methods etc.)
- Access to the integrated editorial services directory
- Pathways to an editing career, including links to relevant tertiary courses
- Membership benefits for new or potential members
- Events, including member meetings and professional development opportunities, such as workshops and conferences
- Promotion of accreditation and mentoring programs, which may be of interest to members and non-members
- Promotion and sales of IPEd publications
- Industry news, with streams for special interest areas, such as science, government, fiction
- News and events from sister organisations in other countries.

Member information

There should be a members-only section of the IPEd website that could include the following:

- Membership administration, via a link to the members portal of the membership system
- Dedicated sections that either link to or include information relevant to the branches
- Interactive blog or forum for inter-member dialogue and conversation
- Professional development training notes
- Industry and professional development resources
- Jobs board where organisations looking for editors can post jobs, freelance assignments and editing contract roles (professional members only
- Constitution, by-laws, Code of ethics.

If this website is to become the organisation's primary channel for sharing information and member interaction – the 'go to' site – IPEd will also need to employ a web minder to frequently monitor and update the content. We will need to decide

how this can be managed – a rotating role for a volunteer, part of the Communication Officer's role or another paid employee?

Recommendations

1.1 A **web manager** should be employed to take the best of the current websites and develop an architecture that addresses the aims, target audience and functionalities required. This position is not budgeted in the transition budget, as a preliminary step would be to form an alliance of current website managers to begin migrating relevant information and investigate the best way to develop a comprehensive, user-friendly, interesting and current site with all necessary functionality.

1.2 In order to ensure that the revised IPEd website suits the needs of what has been identified as its primary user group—professional editors who are members of IPEd—a **maintenance and usage protocol** should be established.

1.3 To encourage regular and frequent use of the resources on this site, it should be developed as a **vibrant and dynamic resource**, with visitors confident of the currency and accuracy of the information it contains.

1.4 A **vocabulary style manual** should be developed by reviewing the current IPEd style sheet and the web log files from the IPEd site and asking users of the IPEd site what they look for. It is also recommended that a procedure be developed to articulate how preferred terms are agreed to and added to the controlled vocabulary.

1.5 The **navigation system must be user-friendly and functional**. It needs to allow for quick access to the most requested features, and to ensure there is no major disconnect from existing, common navigation features of the individual society sites.

1.6 The site layout should also consider **sharing similarities with other international societies**, to ensure that IPEd is identified as an authoritative, national body.

1.7 The **functionalities** of the site must include links to the membership system for core tasks performed by members administered through MemNet, including:
- Administration of their membership
- Applying or enrolling in branch training events
- Creating their listing on the freelance register (Professional members)
- Obtaining industry-related resources.

1.8 **Member blog**

Separate from a newsletter, the IPEd members blog could be a place where members contribute items of interest.

A policy and guidelines for the blog would need to be developed and content moderated by IPEd.

Broadly speaking the blog would entail the following:
- Blog posts to be between 200 and 300 words and cover one topic or issue.
- Blog posts to be regular – ideally once a week or more.
- A forum or facility to comment on blog posts, thereby encouraging inter-member communication.

- A roster for member contributions to the blog will need to be established and adhered to.

Regular blog posts will provide IPEd with the necessary content to share widely through social media.

4. NEWSLETTERS AND MAGAZINES

Each society currently has a newsletter. The newsletters vary in frequency from five to ten times a year and can be accessed from the societies' websites.

One society sends an HTML email to members with links to full articles on the website; member login is no longer required and articles are now public. Another is for members only, with member login required; others are fully accessible to non-members also. Some are emailed to all members as a PDF and archived in the members-only section, being seen as a member benefit.

The newsletters all have news of events, forthcoming workshops, meetings and reports of meetings, with good coverage of topics and speakers. There are also lists of committee members and contact details, and various thought pieces either specially written by members, often the newsletter editors themselves, or edited extracts from websites or books on editing. Most newsletters have messages from the society presidents or committee reports.

News usually includes an update on IPEd and, in particular, the latest on accreditation procedures and the national mentoring program. Forthcoming notices are society-specific, though all newsletters cover forthcoming national conferences.

At present IPEd does not have a formal newsletter as it does not have its own members. The Council uses IPEd Notes to communicate with the societies. IPEd Notes is an information sheet, produced as plain text in a Word document without any images or design.

When surveyed, newsletter editors were in favour of a **single national newsletter**, managed from a central point but with sections for branch-based news.

Recommendations

2.1 Launch and development

Launching a new national newsletter would be a collaborative effort, requiring the expertise and experience of IPEd's Communication Officer and the society newsletter editors, whose publications are likely to be subsumed. This phase would involve the setting up of a new template, and development of policies around content selection, editorial board membership, reviewing etc.

2.2 Target readership

The newsletter would be primarily for the information and enjoyment of IPEd members, but including information and other news that would be of interest to the general public.

2.3 Frequency

A monthly newsletter is manageable, but depends on how much content is available. It is generally felt that shorter, more frequent issues are appreciated more than lengthy, less frequent issues.

2.4 Content sources

Existing newsletters cover a wide variety of content and a new newsletter

committee would develop a new style and content selection criteria. Content could include:

- editing profession news – both local and international
- contributions from members
- contributions from guest editors/writers
- professional development information
- information on the accreditation and mentoring programs
- training courses, both IPEd-sponsored and relevant courses from other providers
- upcoming events
- profiles of councillors or branch office bearers
- branch information and articles that may be of interest to members nationally
- letters to the editor
- competitions and 'just for fun' items.

2.5 Format

All feedback indicated that a digital format would be the agreed format, delivered via the website from a link in a group email each time a new edition is published. Just what file format would be most suitable would depend on the CMS being used on the website. Some prefer a PDF option.

MemNet has an optional module for newsletters with facilities like templates, editing, opening, reading and click-through statistics and automatic synchronisation of address lists. It also has facilities for social and special interest groups, blogs and forums. MemNet, already in use in one society, is a separate online system, so content can be developed separately from the existing website.

2.6 Coordination

The newsletter would be managed by a group representing all branches. It would be overseen by the Communication Officer, who would collate contributions from the branches and generally liaise with the editor.

2.7 Editor

This position could be a rotating guest editor role, with each editor overseeing the production of an agreed number of issues, before passing on to the next editorial group. Each guest editor would solicit articles from guest contributors, co-opt proofreaders, reviewers etc. as required to get the job done.

2.8 Distribution and archiving

There was some discussion about whether such a newsletter should be made public immediately or kept in a members-only area for the first few months before making it public – a policy followed by some societies at present, who see a members-only newsletter as part of the value of joining the society. However, more responses were in favour of a publicly available newsletter, seeing it as not only a great resource for editors, but a promotional tool for the profession to other interested parties. Back issues would be archived on the website.

2.9   Delivery

Once a new issue is published on the website, a link could be emailed directly to members, as well as Twitter and Facebook notifications.

2.10 eBulletins or alerts

IPEd should have an eBulletin or alert, which is a communication tool that could be used for urgent or ad hoc communications. A policy and procedure for use of eBulletin or alert must be clearly defined to ensure it is not abused or over-used as information overload can be irritating and cause people to disengage with the message.

Delivery should be synchronised with the membership system so that new members automatically get the news.

5. SOCIAL MEDIA

Each of the societies has developed a social media presence, mainly through Facebook and Twitter, and to some extent LinkedIn.

IPEd presently has a Facebook profile and a Twitter feed. Both are used to communicate IPEd news and other content that may be relevant and of interest to members or non-members of the societies.

Analytics of the traffic on these sites show that numbers are small but growing every month and attest to the power and popularity of these communication channels.

Recommendations

3.1   While the feedback on the use of social media has been generally positive, most felt that branches should be allowed to **keep their own Facebook and Twitter sites**, and use them as a way to express the individual needs and personalities of those branches. The desire for a strong united identity needs to be balanced against the desire for branches to retain their own voices. Facebook, Twitter and LinkedIn are by no means used by all editors. As such, social media sites should not be used instead of the main website, but as vehicles to drive traffic to that website.

3.2   A **social media policy** needs to be established that includes objectives, key messages, processes and guidelines on who will be authorised and responsible for social media activity, but allows them to remain very informal and flexible.

3.3   **Social media objectives** need to be determined, and appropriate time and budget allocated to maintain these, and may include:

- keeping members informed of IPEd events, news, activities
- developing and promoting IPEd as the peak body representing editors and the editing profession
- a vehicle to promote membership of IPEd
- an avenue to drive traffic to the IPEd website and promote additional communication tools of IPEd
- engagement with the wider community and the issues that affect the profession.

3.4   **Secret Editors' Business** is a closed Facebook group open to members of the societies of editors only. It is a platform for discussion and sharing of ideas on topics of interest to editors. It presently has more than 200 members and is growing steadily. Recent contact with editors overseas has also resulted in

other closed and steadily growing Facebook groups such as **Editors' Association of Earth** and **Leaders of Editors Associations**, sharing info with members, mainly in Canada, UK, NZ, US and Australia.

5. OTHER ISSUES

The issues mentioned in this section were not included in early versions of this paper but, as this transition project has evolved, it has become evident that new policies will need to be developed around each of these aspects during the early stages of implementation of the DMM.

a. Branding
It has not been part of the brief of this Working Party to recommend on future name changes and other branding issues. If DMM is established, it will be a high priority to integrate the look and feel of all future communication. Some of the questions that arise include:
- Will we stay with our current company name of Institute of Professional Editors, or canvass other names?
- If a name change is agreed, what are the legal and constitutional implications?
- How will the branches be designated?
- Will we use a single logo and style for communication or allow for more flexibility within branches?

b. Publishing
Apart from their newsletters, most of the societies have, to some extent, published books, leaflets and guides, as has IPEd itself with *Australian Standards for Editing Practice*. It is likely that, in future, IPEd-published works will become more numerous with, for example, more standardised training programs, accreditation training manuals, mentoring guidelines and other ad hoc publications, both in digital and print form.
Questions that arise include:
- Should IPEd take over the copyright of existing society publications?
- Does each of these publications need an editorial team that monitors the publication, develops revision cycles as required and manages distribution and sales?
- Is a policy required for the development of a publishing program?