

## Chair's Chatter

'This issue of *PEGboard* is appearing at a time of great celebration for PEG.'

People often ask me what keeps me motivated in organising training and other events for PEG, and I almost invariably reply: 'Because we need to celebrate who we are and what we do.' I am, therefore, very pleased to be able to say that this issue of *PEGboard* is appearing at a time of great celebration for PEG.

Firstly, celebration in welcoming to our shores Elizabeth Manning Murphy, President of the Canberra Society of Editors, author and trainer. Elizabeth will be landing in Cape Town on 10 June, and will spend two weeks with us. As many of you know, she will be giving two seminars on the topic of 'Master Editing: Adding Top Value', the first in Cape Town (15 June) and the second in Johannesburg (23 June). These two events were fully subscribed in record time, despite the generous 60 places allocated to each.

During the first week of her tour, Elizabeth will take in some of the sights and experiences of the mother city. She will also attend the Cape Town Book Fair (CTBF) and launch the South African Edition of her latest book, *Working words*, at the fair on Sunday 17 June at 10:00 (please note the changes to the original date and time). During her second week in South Africa our guest will visit the Pilanesberg Game Reserve and important landmarks of South Africa's struggle for democracy, and meet a new lot of PEG members.

You will find a further two stimulating extracts of *Working words* in this *PEGboard* (the first two were reproduced in the issue of December 2011).

Secondly, we celebrate the imminent launch of the important tome our own John Linnegar has written in collaboration with Kris Van de Poel (University of Antwerp) and Wannie Carstens (North-West University). *Text editing: A handbook for students and practitioners* has been described thus in a peer review: 'I believe this authoritative and comprehensive reference work will ... be embraced by language practitioners, trainers and students across the English-speaking regions of our global village.' High praise indeed! The book's three authors will be taking part in a Literary Forum on 15 June at the CTBF, at 14:00.

If you visit the site of the CTBF ([www.capetownbookfair.co.za](http://www.capetownbookfair.co.za)) and look at the programme, you will see that Elizabeth Manning Murphy's seminar heads the list of presentations, coming straight after the opening ceremony. You will also find, a little lower down on the programme, further glowing assessments of *Text editing: A handbook*.

Thirdly, our AGM at the Cape Town Yacht Club on 9 June offers a great occasion to meet and review our achievements and challenges as an organisation. It also provides us with the opportunity to celebrate PEG members who have given and continue to give so much of themselves and their precious time in making PEG what it is and is still becoming. I am looking forward with particular pleasure to awarding the Derrick Hurlin Mentoring Award for the very first time; yet there will also be other well-deserved presentations on the day.

Finally, this issue of *PEGboard* itself celebrates and encourages the freelance editors among us (most of us, at one time or another), by providing us with all sorts of excellent advice and honouring the contribution of good freelancers to the publishing industry. Ian Montagnes' article, enjoining publishers to treat freelancers well, has long been a favourite of mine.

This issue also features one review of a book not related to editing. In response to her call for such reviews, Jenny de Wet has received many submissions. She plans to publish the best of them together in the last issue of 2012. 🍷

Isabelle

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# Viva la PEG!

It was my first PEG brunch on 18 February 2012, and what an enjoyable experience it was!

The venue, Willows Country Lodge in Pretoria, was like chicken soup for the soul! Those beautiful giant trees and shady green lawns provided the perfect background for hours of lively chatter and meeting new colleagues.

It was great socialising with fellow editors and writers, hearing what makes them tick and sharing some of our life and work experiences. It is always fun meeting people with similar interests and hopefully some of us can work together in the future.

My cousin, Hester van der Walt, told me what wonderful people belong to PEG, and since I have joined, I have experienced the helpfulness and willingness to share knowledge and editing tips via the chat group. You are truly a special bunch of people!

I appreciate the efforts of every person who has worked so hard to build PEG into the successful group it has become. Thank you for sharing your knowledge and valuable experience with us newcomers; also a big thank you to all the people who work behind the scenes to keep us up to date with new learning opportunities, jobs and events.

I hope to see you all again and meet many more members.

## **Diana Rabie**

*New member*



*Isabelle Delvare addresses members at the Pretoria PEG brunch*

# PEGboard

## **Newsletter of the Professional Editors' Group**

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# 'Master Editing: Adding Top Value'

## A rare opportunity for editors in South Africa!

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It is with enormous pleasure that the Professional Editors' Group announces the visit from Australia of **Elizabeth Manning Murphy**. This visit by an editor and writer of repute and an international language trainer coincides with the launch of the Cape Town Book Fair and the 29th Annual Congress of the International Publishers Association (also held in Cape Town, just prior to the Fair).

While in South Africa as the guest of the Professional Editors' Group, Elizabeth Manning Murphy will be facilitating two seminars ('master classes') on the subject of text editing. Entitled 'Master Editing: Adding Top Value', these seminars are open to PEG members; members of LAMP alliance partners; publishers and practitioners in the book, journal and magazine publishing chain; and also the general public. The first seminar will be held in **Cape Town on Friday, 15 June 2012**; the second in Johannesburg on **Saturday, 23 June 2012**. This is what she says:

*How do you add value to your text editing? By being prepared, by going the extra mile, by using the tools available.*

**Being prepared** means having confidence in your own control of English grammar and plain English style, reading the assignment carefully and noting the main problem areas that you will need to cover, even sending a quote that will cover your time and expenses accurately.

**Going the extra mile** means doing a little extra for your client that they didn't ask for but will love you for. This might include giving a little extra time for explaining relevant grammatical conventions or offering coaching in English grammar at a reduced rate for a client who is struggling with writing in clear English, for example.

**Using the tools available** means familiarising yourself with standard proofreading marks for hard copy editing and Track Changes (or other computer tools) for online editing. It also means taking every opportunity to learn new ways of doing things through local training courses, private study, online training etc, and practising what you have learnt.

*In this seminar, we will look at all these aspects of editing at 'master' level: we will each read a 10-page document that needs editing and we will work on that document (as a whole and in smaller chunks) in small groups and in general discussion. We will look at the approaches necessary to edit it for several different purposes and different target audiences. We will discuss together as many problems as possible, thrown up by that task.*

*We will cover some of the more problematic areas of English grammar that crop up in many editing jobs, and there will be short exercises throughout the seminar to provide practice in working through areas of grammar that are troublesome to many editors.*

*In addition, we will see how we can add value to our editing by explaining our suggested alterations to the client – there will be short exercises to tackle and sample solutions to take away with you as examples of good hard copy editing and even computer-aided editing (Track Changes) without computers! These will include writing useful 'comment notes' for clients.*

*Finally, there will be an optional bonus exercise which will be emailed to participants after the seminar. This will be a very short assignment to be emailed to the presenter for confidential individual email feedback.*



### ABOUT THE PRESENTER

Your presenter is Elizabeth Manning Murphy DE (Distinguished Editor status awarded by the Institute of Professional Editors, Australia, 2008). She is the current President of the Canberra Society of Editors, has more than 30 years' experience as an editor; as the author of many books on editing, writing and conducting a freelance editing business with Australian and international clients; and as a trainer and coach in aspects of effective writing for a variety of purposes.

Elizabeth is a trained linguist, specialising in aspects of applied linguistics. Her latest book, *Working words* – a series of erudite 'chats' about the craft and business of editing – has been recommended as a personal reference book for every practitioner. It will be referred to during the seminars and will be available for purchase following the South African launch (see page 11).

*PEG approached Elizabeth Manning Murphy and the Canberra Society of Editors for permission to reproduce some of the chats, and this has been graciously granted by both the author and Cathy Nicoll, immediate past president of the Canberra Society of Editors and current chair of the society's book production committee. The chats we are providing here, Chapters Six and Seven, are the next two chats in our series from the book, and provide much scope for rumination. Please see pages 4–10 for these pieces, which have been reproduced in full. More chats will be reprinted in PEGboard during 2012.*

## 6 Seven deadly sins<sup>1</sup>

There are more than seven, of course, in editing as in life, but these are some that seem to me to be pretty deadly and worth avoiding if you want to be regarded as a competent editor. Try making your own list.

### Sin No 1: Writing a slapdash EOI or quote

If you're asked for an expression of interest (EOI), you give just that, no more: your interest in the job, your qualifications to do it, an understanding of what's required, and not much more. You can't provide precise hourly rates until you see a sample of the manuscript. The tone needs to be friendly without giving too much away—don't commit yourself until you write the quote. The EOI is an important piece of writing—it's the client's first impression of you. I saw a four-line EOI recently that was rejected because the editor concerned had not checked for spelling and grammar errors, had quoted an hourly rate before reading any of the manuscript, had used a peremptory tone and didn't refer specifically to the job (See *Editor, edit thyself*). No client will employ an editor who writes in a slapdash style and doesn't proofread their own emails!

Plenty has been written about quoting for editing jobs. There is no need to say more here except to advise being clear about the time required (after checking a sample), what you need to charge for the level of edit required and to cover expenses, your planned approach to the job and what the client can expect and when. This is a definitive document: the EOI is indicative. There's much more to writing quotes—please refer to *Quoting—broad aspects* and *The proposal and quote*.

<sup>1</sup> The seven capital (Latin 'head'), or deadly, sins form a list of sins that has been used in the Roman Catholic church since the early Middle Ages to identify 'human powers ... that may become habits and thus sources or generators of sinful acts' (Glazier and Hellwig 2004, p 126). The modern list of seven dates from the thirteenth century. It usually comprises pride, covetousness, lust, anger, gluttony, envy and sloth (*Macquarie Dictionary*, 4th edn).

## Sin No 2: Not owning and using standard reference books

An editor needs to have at least the following immediately available:

- a good, up-to-date dictionary—in Australia, generally the *Macquarie Dictionary* (latest edition)—it gives Australian-preferred spellings first; in-house editors may need other dictionaries as dictated by house style
- *Style manual for authors, editors and printers* (latest edition); editors of academic material may also need the *Chicago manual of style* or the *Publication manual of the American Psychological Association* for material to be published in the United States
- a thesaurus such as *Roget's thesaurus of English words and phrases*
- a good grammar book—nobody can ‘know it all’ and everyone can be confused by ‘creative’ grammar in a manuscript.

In addition, my bookshelves contain classics by authors including Strunk and White, Gowers, Fowler and the like, editing handbooks by Butcher, Flann and Hill, Mackenzie and others, grammar and style books. This doesn't mean that the beginning editor should go on a shopping spree, but do own the essentials and do refer to them while editing. The best editors are meticulous about grammar and keep up to date with stylistic and idiomatic changes.

## Sin No 3: Losing your copy of the Standards

You aren't meant to commit the *Australian standards for editing practice (Standards)* to memory, but have a copy handy. Print it out from the Canberra Society of Editors website ([www.editorscanberra.org](http://www.editorscanberra.org)) or the Institute of Professional Editors Limited (IPEd) website ([www.iped-editors.org](http://www.iped-editors.org)). You do need to know what your role as an editor is and what a client expects of an editor. It's all set out in the *Standards*. Print out the *Commissioning Checklist* at the same time.

## Sin No 4: Thinking you can compete in a highly technological world with antique technology

Computers date very quickly. If your editing is all manual, you won't have this problem, but online editors need to be able to offer quick turnaround, editing with Track Changes, formatting that is acceptable to printers and so on. If you need to get broadband to cope more speedily with large downloads, do it. There are no prizes for second best—only the best will do in editing. Build the costs into your quotes over a period.

## Sin No 5: Resting on your laurels

Editing, like anything to do with language, moves on. Qualifications acquired years ago are probably not sufficient any more—get up to date with postgraduate courses and with training provided by the societies of editors. Read *The Canberra editor*, and read other journals, manuals and handbooks on editing and style. Learn what's available on your computer and use it. Grab any opportunity to network with other editors. This is where you learn more about editing than almost anywhere else, and all societies of editors welcome visitors from other similar groups to their meetings, training sessions, conferences, and other gatherings. Learn something about our allied professions—indexing, technical writing, graphic design, publishing. There are often joint events, and these are wonderful opportunities for updating knowledge of the whole publishing industry.

## Sin No 6: Not being meticulous and crystal clear in your editing work

The client has every right to expect pernickety editing—that's what you're supposed to be good at. Manual mark-ups should follow standard guidelines and symbols for proof correction; electronic mark-ups (whether or not using Track Changes) should include comment notes where explanation is necessary.

I was once asked to re-edit another editor's work because the client wasn't satisfied. The first editor had done a 'broad brush' edit which was not what the client had asked for, not what the document needed, and not clear in its recommendations. The client had every right to expect more from a competent editor. This was a little embarrassing, but it was good to be asked to do it because the reputation of our profession was at stake.

## And the seventh deadly sin? Sloth

Sitting back and doing nothing. With accreditation here to stay, we all need to lift our game. Very broadly, accreditation of editors means telling the world that such editors have met stringent criteria set by the Institute of Professional Editors (IPEd) in Australia, in much the same way that accountants, doctors and other professionals are accredited by their professional bodies. In Australia, accreditation examinations seek to find out whether the candidate is competent according to the *Australian standards for editing practice*. The *Standards* are revised periodically to bring them up to date, and accreditation management will develop to accommodate the needs of the profession.

But there's no point in any of the hard work being put into all this progress towards greater professionalism and recognition for our profession if we don't take advantage of it and indulge in some self-improvement. Many will prefer not to seek accreditation—that is their choice. We all, however, do need to hone our skills and keep learning how we can do better. For some, this may mean first looking at what we're typing in an expression of interest and making sure that our 'first impression' is our best impression.

## 7 Getting on with clients

My hairdresser was complaining that new young hairdressers often have no idea how to communicate with their clients—‘client relations’ isn’t taught in their courses, and they apparently don’t learn these basic human skills at home. The result is that she won’t take on an apprentice. She feels she can’t be there every minute of the day to supervise and to make sure that apprentices have the communication skills to provide the niceties that her clients expect. What’s it like in other trades and professions?

In the editing profession, we have to deal with clients all the time, and it isn’t just a matter of dealing with text—it includes dealing with people, of all ages and all walks of life and all levels of education. This is addressed directly to new editors.

You’ve got your first client—what next? Much has been written about client relations, and Janet Mackenzie’s book *The editor’s companion* is a good place to start learning about some of the more technical aspects, including contracts—you do have a written agreement with your client, don’t you?

Here are a few of the strategies for getting on with clients that have helped me over the years and that seem to have paid off—you’ll develop your own, but here are my ‘starter’ thoughts:

### Listen

Listening to what your client wants or needs is important in any business relationship. Your client may have no idea at all about editing, or may know a lot, or anything in between. Nevertheless, listen patiently and don’t be judgmental in your response. The client comes first—try to formulate your response based on what the client is telling you. For example, they may say ‘It needs a quick check for spelling and grammar, and that’s all’, but your assessment of the manuscript shows that it needs a restructure as well if it’s going to be an interesting and logically formulated piece of writing. You will need to agree with the client about the spelling and grammar and ease gently into the need for restructuring. Or they may say ‘I need help with the things I get wrong because my native language is “x”—can you show me how to fix this?’ If you know the ins and outs of ‘first language interference’ and their effect on written English, you can use Comment Notes in Track Changes or, better, face-to-face consultations, to teach the client how to overcome whatever the problem is (for example, lack of appropriate articles—the, a, an) and suggest they try to fix the omissions themselves before the edit starts.



## Keep in touch

Keep the client informed on a regular basis during a long job. Develop a practice of reporting to the client every week at least. Clients tend to get edgy if they don't have contact with their editor at predictable intervals.

This practice of keeping in touch has a side benefit—it helps to keep you organised. As you plan the project, it helps to know that a particular day of the week is the day for reporting to a particular client. So you can organise your work so that you will have something to report—keeps you on the ball and keeps the client happy, knowing that you're beavering away.

## Use plain English

Don't use technical jargon when explaining editing recommendations to a client—you could only confuse them. Even a client who is in the same line of business appreciates explanations in plain terms. For example, if you have to recommend cutting down sentence length by making new sentences of subordinate clauses, try showing the client the main 'sentence' (without using the term 'main or independent clause'), and then show them how the other string of words can be turned into a proper sentence—making two easy-to-read shorter sentences to replace the one complex and wordy sentence. Your client may be confused if you talk glibly about independent and subordinate clauses. They will appreciate simpler terminology, and may actually ask for more help as a result.

## Smile!

Yes, even when you write to your client. Try to look and sound relaxed, enjoying the job, keen to get the client's message across to the target audience. Your personality and attitude can shine through even in a phone call. I once heard a client say to their editor, whom they'd never met, 'You must be very beautiful—you are so caring over the phone'. The editor wasn't physically beautiful, but her voice gave that impression, and this was the important thing for the client. How do you do that? Literally put a smile on your face while you write or talk to your client—it will show!

## Don't assume

Don't read into an email request from a stranger anything that isn't there. We all make mistakes. We spot a typo in the email and assume that this represents the standard of writing in the document we are being asked to edit, though we haven't yet seen the document. We see a particular type of grammatical error a couple of times in the sample sent for assessment and assume that this means an overall culture-specific writing problem that will require quite a lot of time to fix in the edit. This is not fair. Don't jump to conclusions.

Equally, don't assume a role for yourself as editor that is not yours to assume. Once a book of mine was edited by someone who thought he liked certain words and grammatical structures better than mine, so changed a lot of mine to suit his preference. Unfortunately, the grammatical structures were wrong and the choice of words put a totally different, and rather pompous, tone on the book. The publisher dealt with the matter by having me fly to another city to sort it out with the editor. Stick to being an editor, perhaps with some added help in indexing, design and even English grammar tuition if you feel up to it. But remember it's the client's work—not yours.

## Be patient

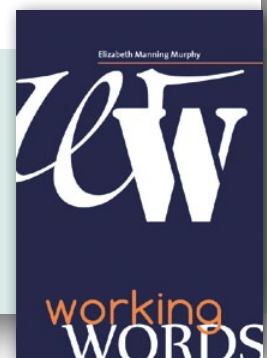
Rome wasn't built in a day, they say. And a book wasn't put together in a day either. As the author of several books, I have been in awe of the patience of my various editors on most occasions. The editor of this volume, for instance, Ara Nalbandian, was patience personified as he gradually winkled out of me what he needed to make the book work for you, the reader. For my part, I have learnt to be patient with clients too, particularly the students who write PhD theses and whose entire careers depend on how well their thesis is received by their examiners. Many of them have never learnt English grammar thoroughly; many of them have heaps to say about their topic but it tumbles out in a verbal roller-coaster; most of them have never had to write anything as long as a PhD thesis and find the whole thing daunting. Helping students through this trying time for them, and making sure that the work remains theirs, with no hint of my help visible, is a really enjoyable challenge. It certainly requires patience.

## Finally, be honest

Say what you can do and don't pretend to be more clever than you are. As a new editor, you can't expect to have accumulated the wisdom of years of experience—it will come. Know what your limitations are and acknowledge them. Any editor ought to be able to undertake most of the general copyediting requirements as set out in the *Australian standards for editing practice*, but not necessarily all the specialised aspects of it. If you need help, seek it from an experienced editor. Likewise, if you need help in preparing a quote for editing, or anything else to do with the business of editing, there are people in the societies of editors around Australia ready and willing to help. You are not alone.

You're on your way in the editing arena—enjoy your relationship with your clients!

*Extract from Working words by Elizabeth Manning Murphy. Used with permission from the Canberra Society of Editors, Australia. ISBN: 9780646559919; Pages: 223; Publication date: 31 August 2011; Format: Paperback. Cost: \$A40 plus postage. Buyers outside Australia should contact the Canberra Society of Editors at <http://www.editorscanberra.org>. A reduction in postage costs may be achieved by combining individual orders.*



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# Referencing techniques workshop

John Linnegar

*Cape Town, Saturday, 24 March 2012*

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Like the yachts berthed in the basin below us at the yacht club, the language practitioners attending Marlene Burger's Referencing Techniques workshop took refuge against an unseasonal howling southeaster, to snuggle in at the welcoming venue for a day of minutiae that are the stuff of academic referencing systems. We were well and truly cosseted by the experience! And thoroughly enriched.

Marlene's 30-plus years of experience in dealing with librarianship, bibliographies and lecturing on the subject of references showed in her easy yet authoritative style of presentation as she took us through the ins and outs of the Harvard system. No question thrown at her phased her; in fact, her thorough knowledge of virtually every imaginable permutation of book or journal entry, or even conference proceedings and unpublished texts, showed not only in her prepared presentation but also in her responses to comments from the floor.

The first session of the day was devoted to working through Marlene's prepared notes, which was a really useful and informative exercise. Then she set us to writing some in-text references and bibliographical entries of our own – the sort of practice that not only makes perfect but also prompts further questions and light bulb moments. Marlene rounded off her presentation by referring briefly to the APA method (insofar as it departs from Harvard) and leading a discussion of how online resources should be referenced – plenty of food for thought there too.

The almost 20 attendees left the workshop feeling, on the one hand, a little redfaced at reflecting upon pre-Marlene bibliographies perhaps not quite so perfectly edited or proofread and, on the other, beaming with satisfaction at having been disabused by a published authority on the subject.

Bravo, Marlene! We'll certainly be tackling future references and bibliographies with greater confidence and skill, thanks to you.

Our thanks go to the Cape Town branch's Marlene Rose for convening the event and to Ken McGillivray and Graham Townshend for their logistical support that contributed to yet another successful PEG workshop. 🐦

## Forthcoming events to look forward to ...

Some of the events that will take place in 2012 and beyond, for members to diarise.

### **PEG Annual General Meeting**

**Date:** Saturday, 9 June 2012

**Time:** 09:30 (lunch from 12:45)

**Venue:** Royal Cape Yacht Club, Cape Town

### **Cape Town Book Fair**

**Dates:** 15–17 June 2012

**Venue:** Cape Town International Convention Centre

### **Book Launches**

#### **1. *Working words* – Elizabeth Manning Murphy**

**Date:** Sunday, 17 June 2012

**Time:** 10:00

**Venue:** Cape Town International Convention Centre

#### **2. *Text Editing* – Kris Van de Poel, Wannie Carstens and John Linnegar**

**Date:** Friday, 15 June 2012

**Time:** 14:00

**Venue:** Cape Town International Convention Centre

#### ***Master Editing: Adding Top Value* – Elizabeth Manning Murphy**

#### ***First seminar***

**Date:** Friday, 15 June 2012

**Length:** Half-day (10:00–14:00)

**Venue:** International Convention Centre, Cape Town

#### ***Second seminar***

**Date:** Saturday, 23 June 2012

**Length:** Half-day (09:00–13:00)

**Venue:** Blandford Manor, Northriding, Johannesburg

#### ***Freelancer's survival toolkit* (Gauteng)**

**Date:** 25 August 2012

**Venue:** (to be announced) Johannesburg

**Note:** Besides these events, others will be organised by the Cape Town and Gauteng branches, and these will be advertised in due time.

# Factors to consider when starting your own business

This is the first of a two-part article which takes the small-business owner or prospective freelancer back to the basics of planning to start up a freelance editing, copy-editing or proofreading business.

AR De Wet

## Introduction

In order to function successfully in the ever-changing business environment, it is important to continuously monitor changing trends, both locally and globally. Not only does technology change the way we do business, but it has developed into a factor that affects our daily lives and the tools we use. In publishing it is taking book production and reading into new areas so that any computer-literate person can work anywhere for businesses or individuals sited anywhere in the world.

For this reason, a South African freelancer is able to bypass local constraints and conditions and may choose to apply for work in other countries. All that is necessary is the technology, an entrepreneurial spirit, confidence in your ability and effective marketing of your services, preferably coupled with a number of verifiable recommendations from satisfied clients.

Hand in hand with this goes efficient research. This includes social and business research into the local and global environment. You need to do your own market research and keep records of your findings and trends analysed.

This sounds a lot like adding burdensome tasks, but at the same time it adds external social, business and socio-political knowledge about the environment in which you are working, and allows you to discern trends in the external environment which may affect your business. An impressive example is the return to prominence of Apple, with its iPhone and iPad product offerings, which have advanced the applications of cellphones and laptop computers and integrated the two.

As a freelancer you need to think beyond the office in which you work, out into the country and its economy and beyond to the world in which we live. You should understand where technology is taking us, how we got there and where we will be heading in future. At the same time, we should plan what to aim for and lay down methods and strategies which will assist in the achievement of these aims and goals.

Do not think only of your micro-environment, but let information, research and your knowledge take you outwards and onwards towards a larger vision of where your efforts can take you.

Once you have formalised your vision, the next step would be to plan and lay down the strategy to achieve it.

## Creating a vision statement

Creating a vision statement is the first step in starting your own business: it is the ideal future you wish your business to achieve, it illustrates the bigger picture of your enterprise and it helps to direct the strategy.

A vision statement is a short sentence or phrase depicting the big picture. It is used as a powerful management tool, and in particular:

- It creates a sense of direction for yourself and potential employees, and it represents a future that everyone can identify with and strive towards.
- It helps guide strategy, goals and objectives, creating uniformity throughout the business, as well as addressing any social responsibilities of the business.
- It plays an important role in supporting your communication and leadership strategies.

Keep in mind the environment is constantly changing and your vision should not be set in stone. It should change accordingly to meet business needs from time to time, but not change too often.

Using the Internet, search for examples of vision statements and then formulate your own.

## Creating your mission statement

Having defined your vision, the next step is to draw up your mission statement. This defines what the business aims to achieve and the values it will uphold.

It is a formal statement of the purpose of the business, and it defines the venture and how it will operate, as well as giving substance to the vision statement.

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The mission statement should include the following components:

- *Product/service scope* – exactly what its offering is.
- *Customer groups served* – what consumer/customer market segments will be targeted.
- *Benefits offered and customer needs served* – what product/service benefits will meet customer needs.
- *Innovation and sustainable competitive advantage* – what differentiates you and your business from those of your competitors.
- *The business aspirations* – how organisational success will be measured.

To give you an idea how these components come together, review the template below:

‘The (**company**) aims to use its (**competitive advantage**) to achieve/maintain (**aspirations**) in providing (**product scope**) which offers (**benefits**) to satisfy the (**needs**) of (**customer scope**). In doing this the company will at all times strive to uphold (**values**).’

The following are some examples of mission statements:

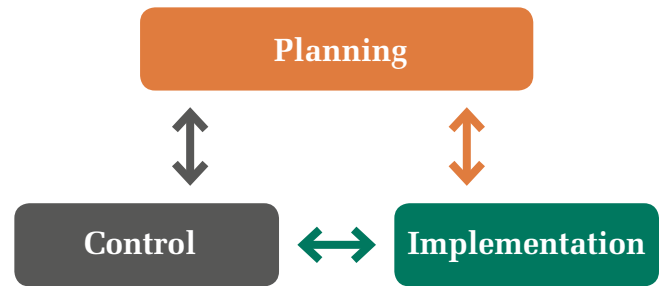
1. **Walt Disney** – ‘To make people happy’  
This statement is supported by the following value statements.
  - No cynicism
  - Nurturing and promulgation of ‘wholesome American values’
  - Creativity, dreams and imagination
  - Fanatical attention to consistency and detail
  - Preservation and control of the Disney ‘magic’
2. **Walmart (1990)** – ‘Become a \$125 billion company by the year 2000’
3. **Walmart** – ‘To give ordinary folk the chance to buy the same thing as rich people’
4. **Sony (1950s)** – ‘Become the company most known for changing the worldwide poor-quality image of Japanese products’

Once you have a mission statement, the goals, objectives and strategy to achieve them can be drawn up.

## The strategy and planning process

‘**Failing to plan is planning to fail.**’ (Ron Watmough)

Strategy can be broadly defined as the actions that an organisation takes to pursue its business objectives. Strategy drives performance, and therefore effective strategy drives good performance.



Strategy can be broken down into three core components. They are: planning, implementing and controlling. Each one is as important as the others. These components need to be viewed in the context of a dynamic cycle, while strategy needs to be amended on a continual basis to suit the ever-changing environment, both internal and external.

Following this, a regular SWOT analysis should be conducted; this will help you identify your enterprise's internal strengths and weaknesses and the external threats and opportunities.

This allows for strengths to be built and focused on in order to create competitive advantages and for weaknesses to be addressed. This can be done in a variety of ways. External opportunities can be identified and then pursued, whereas the impact of threats can be minimised or avoided. A constant analysis of the organisation and its environment should be done to avoid uninformed decision-making.

Strategy is vitally important because it creates measurable goals and objectives; this helps the business to stay on the right track, or allows you to identify problems so that course-correcting actions can be taken.

## Business plan elements

The business plan is a document that identifies where the business is heading and explains in detail how it will reach that future destination.

A business plan serves many functions; here are three important areas:

- Obtaining needed funds
- Providing a communication tool
- Helping to reduce risk

A business plan comprises a few key elements, and those listed below range way beyond freelance editing. The degree of detail will vary depending on the intended use of the plan and the type of venture embarked on.



The main elements are:

- **Product and/or services plan** – this section describes the product or service, to whom it will be sold or supplied, and what industry the business operates in.
- **Marketing plan** – the 4 Ps need to be addressed: product, price, place and promotion; also say what the competitive advantages are, and provide a market-segment analysis.
- **Operational plan** – this details the facilities in use, resources acquired or needed, and business processes, as well as the time schedules.
- **Management plan** – the management team. List all the directors, owners, consultants, advisors and key professionals who will be involved in the business.
- **Financial plan** – this must describe how the business should become profitable, say what financial resources will be required, identify the methods of financing the business and the break-even point, and provide financial projections.
- **Appendix** – this will contain CVs and other supporting documents.

The business processes will be explained in greater detail in part 2 of this article.

### Summary

The article introduces the new entrepreneur or service provider (the freelancer) to the formal elements necessary to start up a business.

The discipline which is needed to formulate a vision and a mission statement, and from there develop a formal business plan, ensures that the business owner investigates the environment in which the enterprise will operate, and is aware that changing circumstances will require alterations to planning, management, operations, finance, and even to the services offered.

### References

- Wickham, P.A. 2004. *Strategic entrepreneurship*, 3rd ed. Harlow: Pearson Education.
- Nieman, G., Hough, J. & Niewenhuizen, C. 2005. *Entrepreneurship – a South African perspective*. Pretoria: Van Schaik.

# Book reviews

## Review 1

Reviewed by Jenny de Wet

### Bibliographic style and reference techniques, by Marlene Burger

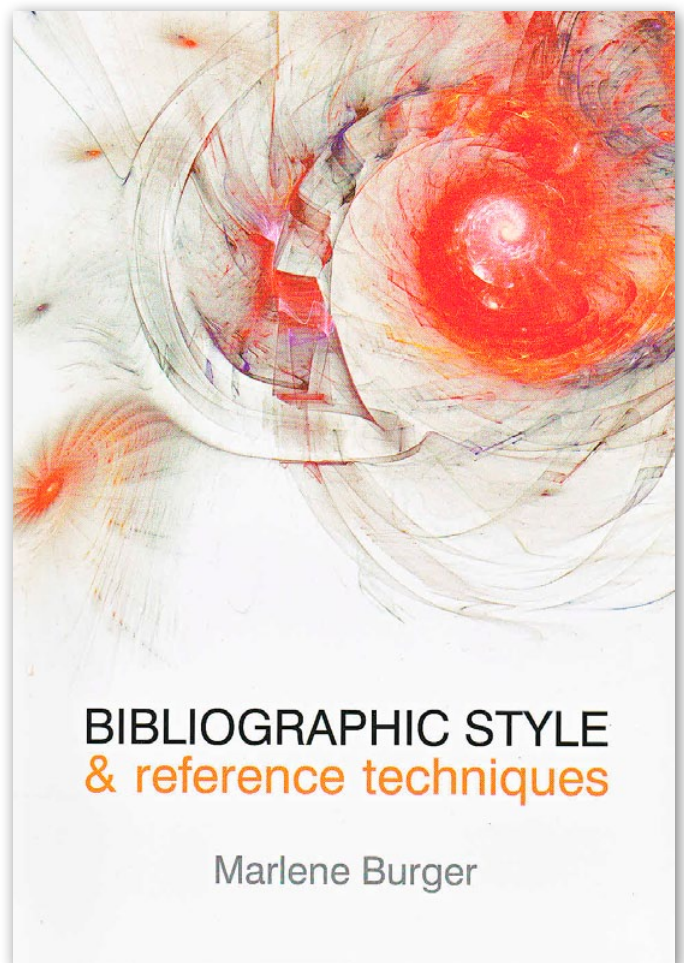
In *Bibliographic style and reference techniques*, Marlene Burger has produced a textbook aimed at guiding students in the application of bibliographic reference methods when faced with recording their research in academic papers, dissertations and theses. Not only does she accomplish her aim, but the book serves as a comprehensive reference book for non-fiction academic authors and editors as well; it can be recommended as a reference source for copy-editors.

Marlene Burger is eminently suited to the task of explaining the latest style and usage of the three methods covered in the book. She has many years of teaching experience in cataloguing and classification and the supervision of postgraduate students in the Department of Information Science at the University of South Africa (Unisa).

The bibliographic styles that are covered in the text are the Harvard, APA and the running notes methods. The first two are the most commonly used in South African universities, and the last method is used in reports where citations are numbered in the text and correspond to numbered footnotes or endnotes which are combined with an alphabetically arranged source list.

An interesting feature is that a paragraph numbering sequence is used for all three styles; these paragraph reference numbers can be found in the index and are used as locators to find the same topic in each of the styles. For example, authors with compound surnames appear in paragraphs 2.20 (Harvard), 3.20 (APA) and 4.21 (Running notes). In this way, the novice can compare the styles related to a topic or form of entry.

An explanatory introduction takes the reader through reference techniques and provides a necessary background before moving on to each of the bibliographic styles. With an eye for detail, the author always gives explicit instruction about correct punctuation. This is an area where the student or novice is frequently at a loss in trying to follow a prescribed bibliographic style consistently, and where errors are frequently found.



*Bibliographic style and reference techniques*  
Selling price: R163

The book can be ordered from:  
Laetitia Theart  
Unisa Press  
Email: [theartl@unisa.ac.za](mailto:theartl@unisa.ac.za)  
Tel: 012 429 3448

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## Review 1 Bibliographic style and reference techniques, *continued*

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The book was published in 2010 and the author has updated entries according to the latest styles, and more up to date than some university departmental style guides issued in 2011. While it is incumbent upon the student, writer or editor to monitor the required style guide of the institution or organisation concerned, the principles expounded in this book are always worth serious consideration.

The introductory General Guidelines explain the functions of the bibliographic components used in referencing, and Burger covers abbreviations, acronyms, journals, newspapers, dictionaries and encyclopedias, government publications, laws, archives, sacred works, music and art, as well as unpublished sources like personal communications, dissertations and theses. She describes in some detail how electronic sources are recorded.

Citations in the written text are shown because they differ in the three styles chosen. This is important for the student

to learn, as the bibliographic style also determines the way authors (and their texts) are cited or quoted in the body of the written work. Copious examples are given, so that the new academic author is guided throughout. An example is quotations within quotations. Editors should note here that the style in use in the academic work supersedes any external style guide that they may be using for reference purposes.

This is a valuable resource for the new academic and the language editor alike, where bibliographic method is explained to academics, scholars and professionals outside the information management field. 🐦

### BOOK DETAILS

**Title:** *Bibliographic style and reference techniques*

**Author:** Marlene Burger

**ISBN:** 978-1-86888-550-3

**Pages:** 247

**Publisher:** Pretoria: University of South Africa, 2010

## Review 2

*First reviewed for Readers Favorite (USA) by Fiona Ingram*

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### *Tribe, by James Bruno*

Meet Harry Brennan, CIA officer and go-to guy on Afghanistan. When his mission in Afghanistan is aborted and he finds himself back in Washington, Harry starts digging until he finds out what everyone doesn't want him to know. And it comes as no surprise to Harry that it's all about money, or oil to be exact. As the Western world's need for oil increases, something must be done to break the stranglehold of the Arab world on oil supplies. A secret deal has been struck to get a US-financed trans-Central Asian oil pipeline to the Arabian Sea built through Afghanistan and Pakistan. This scenario would bring Croesus-like wealth for the oil companies, back-channel cash to politicians and cement American political and economic supremacy in Central Asia at Russia's expense. It would also force the Afghan allies to share power with the Taliban so pipelines could be built and US troops finally withdrawn. Harry finds himself enmeshed in the double and triple cross of the relentless Washington political machine. In a surprise turn of events, Harry finds himself branded a traitor and fleeing for his life from jihadists in Afghanistan and Predator drones in Yemen, a target of his own CIA, while trying to rescue his kidnapped daughter.

This brilliant book is well-paced and -plotted with many interesting layers. It is clear the author has first-hand experience of the novel's politics and his encyclopedic knowledge of the turmoil of the Middle East and Afghanistan is impressive. The author has created in Harry Brennan

a likeable character, with a conscience that compels him to do the right thing in a political arena where most people are doing the wrong thing. The author is a former insider and the book has undergone US government censorship, which explains the occasional vague patch. However, nothing can detract from the riveting read. Harry Brennan's laid-back inner monologue adds to the appeal of the author's style. Readers will also enjoy Harry's pertinent, humorous references to the books, movies, and well-known personalities of popular culture that underscore his worn, somewhat cynical take on politics. The author has an eye for detail and a style of rich description that the eager reader can feast upon. The fund-raising scene is the ultimate description of US politics devouring itself – hilarious yet frightening. It is written with an underlying dry, perceptive sense of humour, and I really enjoyed the book. Highly recommended. 🐦

### BOOK DETAILS

**Title:** *Tribe*

**Author:** James Bruno

**ISBN-10:** 0983764204

**ISBN-13:** 978-098376-420-5

**Genre:** Political thriller/espionage

**Pages:** 366, paperback

**Rating:** Five stars

**Publisher:** Bittersweet House Press (16 July 2011)

Available from Amazon/most booksellers



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# Managing freelance editors

Ian Montagnes

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There was a time when publishing houses had staffs of full-time editors who went over all manuscripts carefully before sending them to the printer. Most publishers today cannot afford such a major expense, and even large houses have come increasingly to rely on freelance (that is to say, part-time) editors. Small and new publishers that are expanding beyond the capacity of their founders almost always have to depend on freelance editors.

There are advantages to using freelances – whether as editors or in other publishing functions, including design and promotion. It's unnecessary to pay them a regular salary and benefits: this reduces overhead costs. Their services can be secured only as needed: this means the publisher is never paying for non-working time, and can respond effectively to fluctuations in manuscript flow. The special needs of any particular manuscript can be matched to the special skills of a particular freelance: this makes for better and more economical work.

Freelances also have disadvantages. They are not tied to the publishing house – the name comes from the mercenary soldiers of medieval Europe who were not loyal to any particular lord and were therefore 'free lances' selling their services to the highest bidder. As a result, freelance editors may not be available when needed.

The most important rule in dealing with freelance editors therefore is:

*Take care of the good ones.* Treat them well. Give them advice and help when necessary. If possible, make space available for them to work occasionally in your offices. Let them use your style guides, dictionaries, and other reference works. Invite them to your celebrations. Keep their loyalty.

*And pay them promptly.* (In the publishing house where I worked for many years we did not pay the highest fees for editing, but good freelance editors worked for us because we paid within one week of their sending a statement – even when we were making other suppliers wait 60 or 90 days for payment.)

The second most important rule is:  
*Provide adequate instructions.*

1. Give freelance editors samples of your house style. Tell them which dictionary you use.
2. Make it clear how much editing you expect. (Do you want the editor to correct grammar and spelling only? Do you expect more substantial editing – even re-writing of chapters?)

3. Set firm schedules for completion of the work. Then stick to them.
4. Set out the freelance editor's responsibilities for checking illustrations, tables, accuracy of quotations and footnote references, and permissions to use work in copyright.
5. Be clear who will be responsible for checking proof and corrections in proof. The freelance editor? An in-house staff member?
6. Establish whether the freelance will deal directly with the author. (The alternative is to keep all communication through the publisher's editor. This ensures more control, but is costly in time, especially if a large number of questions must be discussed.)
7. If a manuscript comes on a disk and the freelance can edit on a computer, establish whether you want the work done directly on the disk and how changes will be shown. Do you want the freelance to work instead on a paper copy of the manuscript? In that case, who will insert the editorial changes – the freelance or someone else?

Be clear also about the fee. There are several ways to determine how much should be paid.

Basically, it is up to the freelance editor to decide how much he or she wants to charge for every hour spent editing. The publisher may then agree to pay that much per hour. But this is an open-ended agreement, because the editor may take many more hours than the publisher considers necessary. Publishers don't like that.

A second approach is ... [to pay] a fixed ... [amount] per page ... [on the basis] that a page contains 250 words. This approach assumes that an average page will take a standard amount of time. But some manuscripts are much more difficult to edit than others, and thus require more than the average amount of effort. Freelances don't like that.

The method I prefer is to treat freelances the same as printers and other suppliers. Give them a chance to review the manuscript and submit an estimate of cost. An experienced publisher should have some idea whether the estimate is reasonable. If necessary, competitive quotes can be sought. Once the estimate is approved, the publisher is sure how much the editing will cost and the freelance (if the estimate is accurate) is sure of fair payment.

Sometimes a manuscript proves much more difficult to edit than expected. In such cases, a wise publisher is flexible and agrees to increase the fee. That earns loyalty and goodwill for future manuscripts.

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If the manuscript is long and editing will take considerable time, payments may be made in instalments as various stages of work are completed. If the freelance is expected to check proof, it is normal to pay most of the fee when the editing is completed and the balance after proof handling.

Finding good freelance editors is never easy. A university degree is no assurance that a person has the keen eye for detail and consistency, sense of organisation, good judgement, broad knowledge, and sensitivity to language that good editing requires. It is best to give a new freelance a test. It may be a formal one, perhaps a passage of text loaded with errors in spelling, grammar, fact and style. More often, publishers give a new freelance a sample chapter and check how well that is edited before entrusting the person with the entire manuscript. It is best to give a new freelance a short manuscript to edit rather than a long one, in case the final result is unsatisfactory.

Freelances need the same supervision as a staff editor. Unless they have lots of experience, they will require training, especially in the special styles, preferences, and requirements of any individual publishing house. That training will pay dividends as long as a freelance's services can be retained. When possible, freelance editors should be encouraged to take training courses.

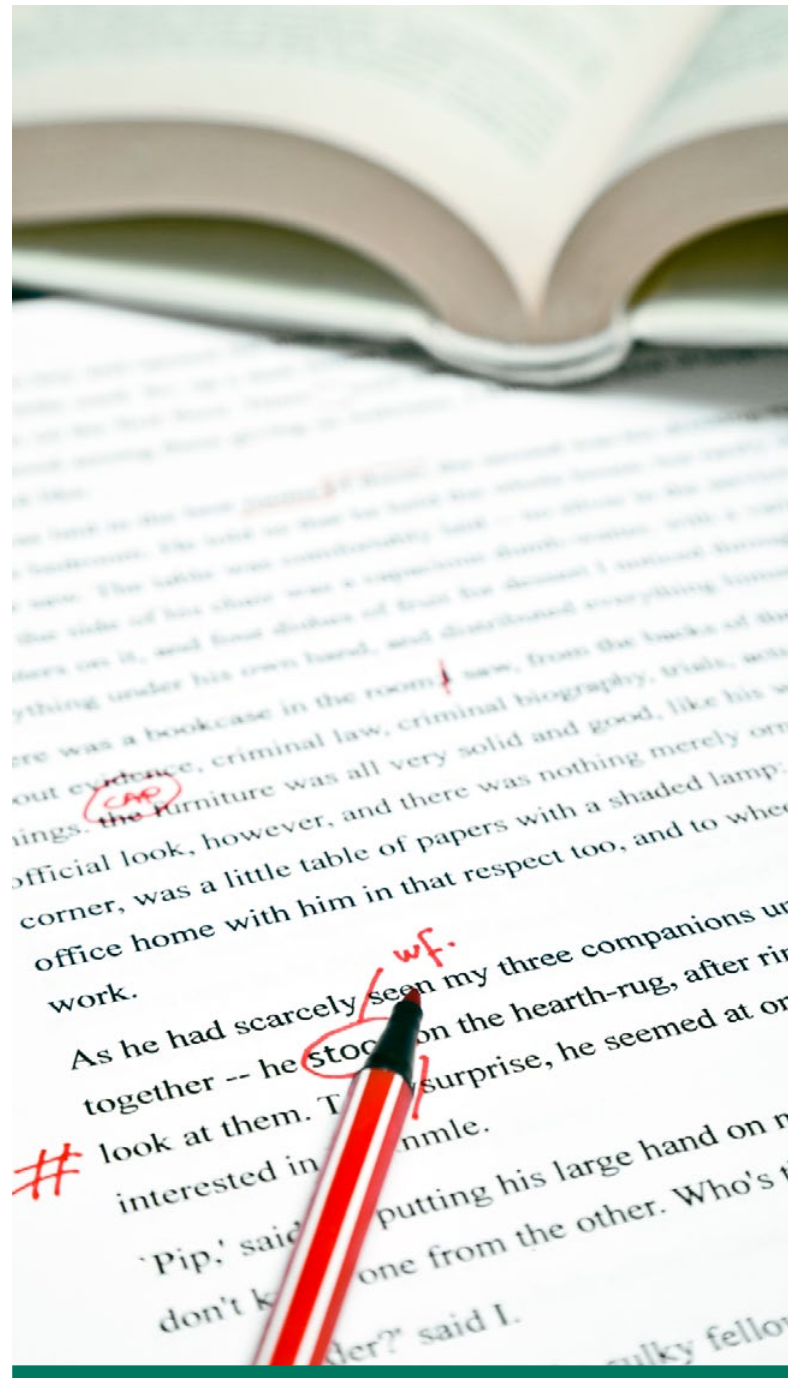
At least in the beginning, freelance work will also require checking. It may need correcting. Here, judgement and restraint are required, for one editor can always find flaws in another's work. The supervising editor should avoid re-doing the work of a freelance. If much extra editing is needed, the manuscript should be returned to the freelance with clear instructions on what remains to be done. That way, the freelance will learn for the next time. If that approach is impractical (if, say, the freelance is unavailable for extra work, or appears incapable of learning), the fee should be reduced.

Ultimately, the key to successful management of freelance editors (or of any other freelance publishing professionals) rests with the manager entrusted with that responsibility. Freelances need clear and detailed instructions and the helpful guidance of an experienced supervisor.

They deserve also to be treated well. You, as publisher, need their services as much as they need you as a client. A corps of reliable, trained freelance editors is as valuable – and usually less costly – than an equivalent full-time staff. They are part-timers, but it pays to make them feel part of your publishing family. 🍀

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