

A way forward: Review of IPEd
Summary and analysis of the
2012 Survey of Societies of Editors

1. Main findings	2
1.1 Introduction.....	2
1.2 IPEd’s core activities	2
1.3 Societies of editors’ activities	2
1.4 The marketing dilemma	2
1.5 Resources	2
1.6 The way forward.....	3
Options for immediate action:.....	3
Models for the future	3
1.7 Conclusions.....	4
2. Detailed summary of survey responses.....	5
2.1 About IPEd.....	5
2.2 About the industry.....	6
2.3 About your society	7
Activities	7
Membership	8
Expenses	8
2.4 The future.....	9
3. Suggested options for the way forward.....	11
3.1 Options for immediate action.....	11
3.2 Models for the future	12
Restructured IPEd model	12
Collaborative model.....	13
Progressive ‘merger’ model.....	13
Direct membership model.....	14
3.2 Analysis of models against goals	15
Appendix: Other ideas suggested by survey respondents	16

1. Main findings

1.1 INTRODUCTION

A review of IPEd, its functions, and its relationship with the member societies was initiated in August 2012. As a first step, the societies of editors in Australia were surveyed in September–November 2012. This paper summarises the results and the suggestions by societies and IPEd for some possible ways forward.

1.2 IPEd'S CORE ACTIVITIES

There is a consensus that IPEd should continue. Its core activities were identified as:

- managing the Australian Standards for Editing Practice (ASEP)
- managing and promoting the accreditation of editors
- promoting editing, editors, ASEP and accreditation.

There is agreement that the first two continue. While societies also want the third, IPEd says it does not have the resources.

There were some suggestions for what sort of structure could be suitable for IPEd and societies. These are presented in section 3 of this paper.

1.3 SOCIETIES OF EDITORS' ACTIVITIES

The societies, unsurprisingly, saw their core functions as providing services to their members, with a slight emphasis on professional development and training. Regardless of the future of IPEd and the societies, the consensus was that the societies (however they are formed) will always be involved in delivering local services and maintain the personal connection with editors.

The need for continued engagement with local editors, regardless of the model eventually adopted, is an important finding of this survey. This is an engagement dilemma – how to increase national activity while maintaining or even increasing engagement with individual editors.

1.4 THE MARKETING DILEMMA

These two sets of responses – the core activities of IPEd and the core activities of the societies – have presented a dilemma. Everyone agrees that more and better marketing and promotion of editing is needed, with societies agreeing that:

- marketing is seen as a core role for IPEd – but IPEd does not have the resources to do it
- neither IPEd nor the societies has been able to market our industry effectively (if they had, there would not be the demand for marketing that is seen in this review).

The lack of a national identity for editors was also raised as an issue, with the need for a single and nationally identifiable brand raised by several societies and by IPEd. This broader need for a single and identifiable brand, and better marketing of our industry and what structure might best allow that, are significant findings of this survey.

1.5 RESOURCES

Resourcing was an issue that will have to be dealt with in this review.

From IPEd's point of view, it cannot continue in its current form:

- IPEd has the resources for managing the accreditation system and the standards.
- IPEd does not have the resources to develop a marketing/PR plan and implement it.

If IPEd is to meet the demand for marketing, then it needs more resources, whether in the form of money or volunteer time.

The societies presented their own views:

- Most are run on a break-even basis, raising enough money to do their core activities with little left over. Some have substantial savings, some do not.
- All rely heavily on volunteers – volunteering enthusiasm is clearly cyclical as some societies are experiencing a downturn, others are doing well.

There was no clear agreement on how resources could be redistributed for the benefit of the editing profession, if at all. While there is a clear need for more resources for national activities (which IPEd could do), the societies were not united in enthusiastically offering IPEd more money without seeing what could loosely be called a good business case. On the other hand, several societies could see the value in pooling resources (time and volunteers) for activities that could be done at a national scale. This was variously expressed as forming a single national organisation, or increased collaboration between IPEd and its member societies.

1.6 THE WAY FORWARD

The survey results provided two complementary ways of proceeding:

1. Options for immediate action
2. Models for a way forward in the longer term.

Options for immediate action:

There were suggestions for immediate action, regardless of the model we move to:

- **Website:** Society and IPEd web coordinators collaborate to research a shared website that maintains local and national content
- **National journal:** Society newsletter editors collaborate to investigate a national journal/newsletter
- **Administrative innovations:** Societies have vast experience in low-cost, innovative solutions. They could share their experience in adopting innovative solutions for lightening the administrative load.
- **Finances:** Society and IPEd treasurers investigate financial options for the ongoing viability of IPEd and societies under the four models proposed.
- **Change of name:** IPEd and societies to investigate the potential for adopting one name to create a single, Australia-wide brand.
- **Legal structures:** IPEd can investigate the options for change of legal structure immediately and in consultation with the societies.

Details of these options are in section 3.1 of this document. The Appendix also contains a list of specific suggestions, for example for marketing initiatives, that include some good ideas that are outside the scope of this review.

Models for the future

The survey results have given four possible models for a way forward:

- Restructured IPEd model – IPEd restructures and restrict its activities to accreditation and ASEP. No new resources for national activities. There would be no added funding for IPEd beyond the \$25 annual levy. The societies will continue to serve editors on a state and territory basis.
- Collaborative model – IPEd restricted to accreditation and ASEP. National activities are done under an explicit agreement for societies to work together on national activities. IPEd's involvement was not clearly described by advocates of this model.
- Progressive merger model – establish a single national body (which could be called IPEd) with the capacity to appoint paid staff, but societies merge as they are ready to do so. Funding

for national activities progressively increases as it gains members. Formal agreements will be needed for societies to support national activities until they join with IPEd.

- Direct membership model – establish a single national body with paid staff. Societies could keep their existing savings and responsibility for local activities. IPEd collects all new money and is responsible for all non-local activities. Funding for national activities assured.

The features and challenges of each model are described in detail in section 3.2.

This paper makes no judgement about which is better. All four have their features and challenges.

An option for the status quo (no change) was not proposed by any society. IPEd does not regard it as viable, and it is not discussed further.

1.7 CONCLUSIONS

There was broad agreement on our current goals as a profession:

- maintain the accreditation of professional editors
- maintain the *Australian Standards for Editing Practice*
- increase our visibility, which includes better marketing
- improve engagement at the local level with societies and with national issues and IPEd

There was also broad agreement on some of the main challenges. Section 2.4 contains some detail and can be summarised as concerns about:

- money – both IPEd’s and the societies
- local engagement and volunteering
- the need for societies to retain control over their identities, local activities and freelance registers
- sharing the workload for national tasks
- trust in and accountability of IPEd, and fears of an extra layer of expensive and unaccountable bureaucracy
- staffing
- engagement with IPEd by individual members
- the need for better communication
- the likely costs of a new structure.

An important next step is to analyse the four models in terms of the goals that societies of editors have said they want. The table below gives a quick, initial analysis, but a more thorough analysis is needed. Some work is also required to address the many challenges that the profession faces.

How well can the four models proposed by societies achieve those goals?

Table 1: Are the agreed goals likely to be achieved by the models proposed?

Goal	Restructured IPEd	Collaborative	Progressive	Direct membership
Accreditation	yes*	yes*	yes	yes
ASEP	yes*	yes+	yes	yes
Marketing	no	possible+	likely+	yes
Local engagement	no change	yes	likely+	likely+

Notes:

* These activities can continue, but long-term viability is not guaranteed without more resources

+ Success depends on increased local engagement and volunteer effort

Further analysis is required in terms of the goals and how to resolve the challenges of a preferred model.

2. Detailed summary of survey responses

2.1 ABOUT IPED

a) *What do you see as IPED's core functions?*

b) *Are there other functions you would like to see IPED take on?*

c) *What (if anything) do you think IPED should change:*

- *to better represent the industry?*
- *to improve its relationship with your society?*
- *to improve its administration?*

The unanimous response from societies and IPED papers was that IPED should continue. IPED's core functions are to:

- manage the Australian Standards for Editing Practice (ASEP)
- manage the accreditation of editors
- promote editing, editors, ASEP and accreditation.

Suggestions for other functions that IPED could take on included:

- publishing a national journal, which could include
 - professional, thought-provoking articles, possibly as syndicated content
 - society newsletter content (state/territory news).
- promoting the national conference, leaving the societies free to focus on their area of expertise as a profession: the content – topics, speakers, and workshops
- assistance with organising conference administration (e.g. bookings, payments, appointing a part-time paid conference manager)
- managing a national website on behalf of societies (with various levels of participation from the societies suggested)
- coordinating professional development (training and workshops) (ranging from societies retaining all of this function, to IPED managing almost everything).

Suggestions for improvements in IPED administration and management included:

- a need for a more commercial approach to IPED's expenditure, limiting activities to the revenue raised
- recognition that increases in the IPED levy put a financial load on societies as they cannot easily increase their membership fees to cover higher IPED levies.

The need for an increase in IPED resourcing was recognised by almost all societies, but there was not agreement on the method:

- some suggested an increase in funding
- some suggested an increase in society participation (e.g. by expanding volunteer recruitment to outside committees).

There was a divergence of views on the future of IPED, and what IPED could change, with no overall agreement on a possible model. Suggestions could be summarised as:

- establish a single national body with paid staff:
 - as a type of national association with direct membership by editors (**direct membership model**)
 - by societies merging as they are ready (**progressive merger model**)
- maintain IPED's current functions (accreditation and ASEP)
 - improve current IPED administration (**restructured IPED model**)
 - IPED to focus on accreditation and ASEP
 - improve cooperation between societies
- shift IPED's focus to facilitate cooperation between societies, to take the burden off IPED (**collaborative model**)
- no suggestions (2 societies).

2.2 ABOUT THE INDUSTRY

What is needed for better recognition of editing as a profession?

Overall, the responses were consistent across societies and IPEd. There was significant overlap with the response to the first set of questions about IPEd.

In general, most comments indicated a need for better marketing of editing and the profession of editing. Suggestions included:

- ideas for specific initiatives (see the list at the end of this paper) – there was no indication of the extent to which societies already do any of these
- the need for a nationally consistent brand
- the need for a broader understanding of the range and extent of services a skilled editor can provide
- the need to better promote editing, standards and accreditation.

We note that there has been no clear responsibility for these tasks since IPEd was formed: should IPEd or the societies be promoting the profession, or both? In reality, the societies do not have the resources or the time to meet these challenges at a national level while keeping their own associations going. If they had, this question would not have even been on the survey. On the other hand, IPEd does not currently have the resources that are required to take on this challenge and be effective.

While both IPEd and the societies have clearly done their best, the society responses all show that more is needed – both in terms of the resourcing and the outcomes. Even if we take the view that everyone has been working together, or that everyone’s efforts count, IPEd asks a significant question: to an outsider: who represents the editing profession in Australia? Is it IPEd or the differently named societies of editors?

In marketing terms, this is a branding issue: we do not have a clear national brand ... The current structure makes this task difficult. Adding to the potential confusion of two brands is that each state has its own identity. State websites also carry different (not necessarily inconsistent) information and have varying standards of design.

A single brand would make it easier for the profession to be recognised, nationally and internationally; to gain greater loyalty from members; and to withstand competition. The aim would be to develop the brand into a mark of quality and consistency.

Creating a single brand requires a change of name. So who should it be: the societies or IPEd?

Comments here are:

	Retain IPEd	Retain society names
Effort and value	The profession went through some agony come up with IPEd (it wasn't easy)	The societies have had their names for several decades in some cases. Some have also changed their names recently
Market recognition	IPEd is slowly establishing market recognition through work, for example, with the Vice Chancellors Committee and the APA	The societies may have good local recognition (although this is not supported by the almost universal cry for better recognition of what editors do)

2.3 ABOUT YOUR SOCIETY

Activities

The various activities of most societies of editors are listed below (from the 2009 survey).

- *Newsletter*
- *Training/professional development*
- *Meetings/events*
- *Freelance register*
- *Website*
- *Liaison with other industry groups (e.g. writers, indexers)*
- *Promotion, advocacy*
- *Financial management*
- *Bookkeeping*
- *Membership register*
- *Other governance*
- *IPEd/Accreditation*
- *Job notices*
- *Other (please list)*

Of these:

- a) What are the most important (core) activities of your society?*
- b) What activities could you do in cooperation with other societies?*
- c) Which activities do you outsource on a fee-for-service basis (or have done so)?*
- d) Which activities are the most challenging for your society?*
- f) What takes the most time for your volunteers?*
- g) What are you doing to spread the load/reduce the time required?*

Most societies saw all the listed activities as being 'core' to some extent, although the financial management and bookkeeping activities were clearly in the category of being necessary, even if not a core activity.

That said, the most important activities that needed to be kept local were:

- running meetings and professional development
- freelance register (few were willing to share as this)
- the bank accounts
- communication with members – the newsletter, website (ability to filter for local news to maintain relevance to local editors).

Most societies have trialed outsourcing of bookkeeping/financial management, but tended to find it was more trouble than it was worth.

One society is trialing software developed for bookkeeping/reporting by incorporated associations and found it worthwhile.

There is currently little cooperation between societies, largely due to the tyranny of distance. That said, there is support for more cooperation between societies, and a potential role for IPEd in:

- training and professional development
- promotion and advocacy
- website management
- national journal (incorporating a newsletter in some responses)
- social media
- giving editors the opportunity to volunteer for national (IPEd) tasks.

All societies saw their communication media – newsletters and websites – as important. But most could see some value in cooperating in this area. The challenge will be to keep communication nationally significant but locally relevant.

The more time consuming tasks are consistently the administrative ones. There is a burden on treasurers and the membership coordinators. It is the tasks of these two offices that have been outsourced, suggesting the committees recognise the workload they carry.

Managing memberships was challenging for several societies. It is a continual marketing exercise to recruit new members, and another one to keep them. Applications need to be assessed, fees managed, and activities organised.

On top of all this, there is a cycle in the willingness of people to volunteer. Some societies are currently in an upturn, others are in some difficulty. Several societies have increased the size of their committees, or created new opportunities for people to contribute by, for example, creating a back-up buddy system for committee tasks or expanding the committee, with a view to reducing the workload on an individual.

That said, it is probably fair to say that not all members are active, both in terms of the percentage of volunteers for committee or other positions and the percentage that attend meetings or events. People seem to be active for several years, and then step back to focus on other activities. The question for societies is whether the members who have never been active (other than perhaps a freelance register entry and a monthly newsletter) would really care about who manages things.

Membership

h) What reasons do people give for joining your society (e.g. freelance register, networking etc)?

Societies said the main things their members joined for were:

- training and professional development
- accreditation
- professional recognition
- networking
- freelance register.

Of course, there are many reasons. These were the most commonly cited.

Expenses

The 2009 survey reported that “The largest expenses incurred, by size of expense, were the IPEd levy, subsidising meetings (venue hire and catering), with smaller amounts for awards (Victoria), pre-conference expenses (South Australia [now Western Australia]), accounting, auditing and legal fees, insurance, newsletter printing and postage, website development.”

i) Is this still accurate for your society?

j) Are you able to give rough estimates of the costs involved (and any other relevant costs)?

The societies costs have not changed significantly:

- the IPEd levy is still the single biggest cost
- meeting and professional development costs are still significant, including:
 - venue hire (some societies have been able to use free venues)
 - catering
 - speaker costs (travel, fees, accommodation)
 - (some societies run training on a cost-recovery basis)
- newsletter printing costs have declined in societies that have moved away from print to e-newsletters (in varying degrees)
- administrative fees – including audit fees
- website fees – vary from almost nil (when relying on volunteers and just paying for hosting) to thousands (fully outsourced or a major redesign)
- insurance was very expensive for some societies, while others do not have insurance.

In general, we estimated from the information provided that societies spent about:

- 30–50% of their income on activities that IPEd could manage (newsletters, website, accounting, auditing), including 20% on IPEd fees.
- at least 50% of their income on activities that only they could do (training, meetings, freelance register).

Societies should be asked to confirm these estimates.

Is there potential for cost savings? There is insufficient information. Society expenses vary greatly. Whatever the model adopted, any solution needs to be scaleable from the smallest to the largest society.

At this point, we would like to thank the societies who revealed their activities and expenses. It has helped this paper to be grounded in reality. In order to assess finances and develop realistic financial models, we will need to ask all member societies to disclose their accounts in more detail.

2.4 THE FUTURE

k) How do you see the relationship between IPEd and its member societies evolving over the next five years?

There was strong support for IPEd to:

- **do more promotion, manage accreditation and ASEP:** these were agreed to be core activities of IPEd and were supported
- **be better resourced:** most agreed the current situation is inadequate, but the solutions ranged from looking for funding from outside IPEd, to increasing the IPEd levy on societies, to devolving functions back to the societies (through more collaboration with and between the societies). There was no agreement on any one funding model
- **foster collaboration:** between societies to make local activities and resources go further
- **publish a national [monthly] journal:** most societies supported a national journal. The main issue was maintaining local connectedness and local content. There were also hints of concerns about the likely cost if societies lost control of the business model
- **media:** most societies supported increased media activity by IPEd, ranging from formal national PR strategies, to a low-cost social media policy with shared content for national issues, but local content for promotion of events and issues of local importance
- **increase local engagement:** societies recognised an ongoing need to support their local editors and increase participation in society activities. Also noted was the need for IPEd to engage better with editors, with no clear direction on the method: options included a better communications strategy, improved consultation, more collaboration, or a change of legal structure.

There were, however, some significant issues:

- **money:** societies have built their funds up over many years, with the hard grind of organising conferences, training, publishing books and by frugal management – never spending more than they have. As a result, societies are understandably protective of their money. As one society put it, IPEd will get society savings ‘over my dead body’. Others were more willing to engage in cost sharing, in exchange for more accountability – a greater say in how money was raised and spent
- **identity:** many societies are protective of their society’s identity and would be reluctant to lose it
- **work sharing:** many societies were willing to share the workload associated with administrative tasks (although not so many were willing to fund it)
- **employ paid staff:** to allow IPEd to do more (extra funding was usually proposed with this option). Not all societies supported this; one pointed out that ‘The secretariat of any national body has to be very well paid to reach outputs equivalent to that of volunteers.’ Others wanted to spread the volunteer load rather than employ people

- **freelance register:** most societies wanted to retain this important activity and few were willing to hand it over to IPEd
- **ownership/engagement:** there is a distinct lack of ownership of IPEd by individual members. Some responses to the survey included comments about how little members knew about IPEd, although there were few very negative comments. The company structure that distances IPEd from members is believed to be a significant cause of this as it has been very disempowering of individual members. As one society stated, for editors to see the value of IPEd, they need to get something out of it professionally and personally, including professional development and opportunities to have a say as well as volunteer to help out with the workload
- **IPEd's funding:** there was no agreement on more funding for IPEd. A few supported an increase in the IPEd levy, more did not, for example:
 - 'members might recognise the need to pay professional fees for a professional body rather than the current social club level of fees' or
 - 'foster collaboration between states to make [existing] resources go further' or
 - 'there may always be friction between [IPEd] and the state societies that resent having to pay a levy for not much in return'
- **bureaucracy:** there is a concern that any change could add another layer of expensive and unaccountable bureaucracy. There is a well-founded view that grass-roots activity is where things happen. The challenge to a national body is to enhance grass-roots activity rather than disempower involved individuals
- **volunteering:** there was no agreement on this issue. While some saw IPEd as a panacea to declines in volunteering, other societies were protective of their volunteer base, rightly seeing it as their ongoing sustainability. Understandably, some societies with a good volunteer base were less willing to hand over responsibilities to IPEd. Societies struggling for volunteers now are unlikely to find an increase in enthusiasm with the move to a national body. There would also be a need to keep some level of local committee (even if just a chaired local branch committee), with the result that the demands on volunteers will continue for some roles
- **accountability:** the lack of direct involvement by individual editors has created a perception that IPEd is not accountable. If IPEd is to have any future, this must be addressed
- **communication:** communication between IPEd, societies and individual editors urgently needs improving
- **costs:** societies may spend a substantive proportion of their ordinary income on activities that could be done at a national scale. We cannot tell at this stage whether there will be economies of scale by merging/sharing, or whether the imbalance of society sizes will create diseconomies of scale.

3. Suggested options for the way forward

3.1 OPTIONS FOR IMMEDIATE ACTION

Survey responses suggested the following, which could be implemented immediately, regardless of the eventual legal structure of IPEd and the societies of editors.

Website: Society web coordinators research a shared website:

- using an open source platform (e.g. wordpress (3 societies), joomla (1 society))
- feature a national front end
- feature society sections (sub websites) with local branding option and ease of maintenance by the societies
- build around user needs – national presence but locally useful.

National Journal: Society newsletter editors investigate a national journal:

- feature thought-provoking articles
- feature local society content (as a local news section, or equivalent)
- aim to have a solid cost-recovery (i.e. small profit) business case
 - initial funding through transfer of current society newsletter expenses
 - consider other revenue: syndicated content and advertising
 - long-term funding depends on IPEd model adopted. Could include direct subscription (opt-in or as part of membership fees), or ongoing support from the societies
- consider paying for assistance to develop the business case if current editors don't have the time/skills.

Administrative innovations: Societies have vast experience in low-cost, innovative solutions. They could share their experience in adopting innovative solutions for lightening the administrative load. For example, the Canberra Society of Editors is trialing Admin Bandit for bookkeeping and treasurer functions (low-cost and scaleable to any size of incorporated association). Victoria has a full online booking and payment system (cost and scaleability needs to be explored due to cost).

Finances: Society and IPEd treasurers investigate financial options for the ongoing viability of IPEd and societies under the four models proposed.

Change of name: IPEd and societies to investigate the potential for adopting one name to create a single, Australia-wide brand. Some work is required:

- IPEd and willing societies gauge the market impact of changing their names, for example: IPEd to 'the Society of Editors' or 'Editors Australia'; [State] Society of Editors to 'IPEd [State]' or 'Editors [State]', noting that:
 - this in itself requires no change in legal structure
 - the societies can retain their independence
 - a constitutional change may be required (which can be very difficult and could take some time). Alternatively, the societies can simply change their public name (the Royal Australian Institute of Architects did this recently – they dropped the 'Royal' from their letterhead and everything else, but with no legal change to their name)
- societies who are not willing to engage in this change need take no action
- the name change creates a media opportunity that IPEd and societies could take advantage of (i.e. it is news, and we don't have much real news).

Legal structures: Any change of legal structure is complicated. Options were suggested in relation to the direct membership model: (a) a company with an expanded shareholder base, (b) an Australian registered body (the equivalent of a national incorporated association – see <<http://www.gtlaw.com.au/comparison-of-legal-structures-suitable-for-nfpps>>), or (c) a cooperative (the most democratic). IPEd can investigate the options immediately and in consultation with the societies and its future members/shareholders.

3.2 MODELS FOR THE FUTURE

The survey results have given four possible models for a way forward:

- **Restructured IPEd model** – IPEd structures to restrict its activities to accreditation and ASEP. No new resources for national activities. There would be no added funding for IPEd beyond the \$25 annual levy. The societies will continue to serve editors on a state and territory basis.
- **Collaborative model** – IPEd restricted to accreditation and ASEP. National activities are done under an explicit agreement for societies to work together on national activities. IPEd's involvement is was not clearly described by advocates of this model
- **Progressive merger model** – establish a single national body with the capacity to appoint paid staff (which could be called IPEd), but societies merge as they are ready to do so. Funding for national activities progressively increases as it gains members. MOUs or similar will be needed for societies to support national activities until they join with IPEd.
- **Direct membership model** – establish a single national body with paid staff. Societies could keep their existing savings and responsibility for local activities. IPEd collects all new money and is responsible for all non-local activities. Funding for national activities is assured.

The features and challenges of each model are described in terms of the responses to this survey.

An option for the status quo was not proposed by any society. IPEd does not regard it as viable, so it is not discussed further.

Restructured IPEd model

IPEd structures to restrict its activities to accreditation and ASEP. No new resources for national activities. There would be no added funding for IPEd beyond the \$25 annual levy. The societies will continue to serve editors on a state and territory basis. Only one society advocated for this approach in any way, and even that tended more towards the collaborative model. IPEd's comments on this model are included to suggest the only possible way IPEd can see it could be sustainable.

Features:

- IPEd maintains its current legal structure – a non-profit company with the societies as shareholders
- IPEd restricts its activities to accreditation and ASEP – current resources allow little else
- the IPEd and accreditation committees merge, IPEd's secretary serves the accreditation board
- IPEd does little or no marketing and promotion
- current resources levels for national activities remain
- current levy of \$25 per member continues, but it is used exclusively to support accreditation and ASEP development.

Challenges:

- **funding:** continuing struggle to fund national activities, and they would most likely be neglected. IPEd would need to develop new sources of funding through sponsorship and government grants to promote accreditation. Formal agreements with member societies might be required for specific activities.
- **volunteers and engagement:** IPEd would need to work with the societies to develop processes that involve more participation in national projects by society members, in addition to councillors
- **duplication:** continued duplication of functions and costs across IPEd and the societies
- **branding:** limited or no capacity to establish a national brand and identity for Australian editors
- **accreditation:** possible failure of accreditation unless additional resourcing for promotion and exam development can be provided
- **marketing and PR:** total inability to undertake any promotion, PR and advocacy activities (this was considered in the survey responses to be a prime function of IPEd) due to lack of resources.

Collaborative model

This involves IPEd restricting its activities to accreditation and ASEP, with all other goals achieved by cooperation among societies.

Features:

- a grass-roots resource-sharing approach
- national activities shared by societies, for example through working groups
- societies retain their own identities and control over what is shared
- IPEd restricts its activities to accreditation and ASEP (as in the restructured IPEd model)
- IPEd does little or no marketing and promotion, relying on the societies to form working groups for the purpose
- national activities done by volunteers and grass-roots engagement by society members (for example: an urgent need is for someone to convene the national communications group)

Challenges:

- **promises:** could be a de facto version of the restructured IPEd – it is too easy to make promises, but not follow through
- **resources:** would require new formal arrangements for resource sharing to ensure long-term arrangements can be set in place and be sustainable (e.g. a marketing plan). Formal agreements between societies may be required
- **distance:** societies do not traditionally have a strong relationship with each other (their relationship with IPEd is stronger)
- **no change:** existing flaws in the IPEd–society arrangement are not resolved and potentially undermine theoretical gains.

Progressive ‘merger’ model

This is a variation on the direct membership model. Societies join with a newly formed IPEd as they are ready. There is no timetable, other than one of convenience for societies.

Features:

- IPEd changes its legal structure from a company with six shareholders (the societies), to a more accommodating and inclusive structure that avoids the inflexibility of a company established under the Corporations Act
- a new body (perhaps called IPEd) with a new constitution is established
- the new constitution allows for societies to join as ‘independent’ entities (subcommittees or branches) under the national body, with protection for their activities and their own names (if wanted), bank accounts, etc – to maintain the strong local involvement of their ‘members’
- societies join the new IPEd as they are ready to do so (they will need to wind up or amalgamate) – for example as local branches. These newly-formed ‘local branches’ retain:
 - professional development and networking program (using national services for administration, e.g. venue hire)
 - member communication (newsletter content etc.)
 - budget allocation for society activities – for example, events (meetings and training), local content in the journal and website, member notices.
- membership lists to be retained by societies until they become part of IPEd
- the new IPEd manages national activities as agreed – e.g. accounting and auditing, journal, website – while maintaining a strong local involvement
- societies not ready to wind up/amalgamate can access local services on a fee-for-service basis (or other agreed mechanism)
- possible to project a consistent professional image of editors nationally (membership criteria, accreditation, continuing professional development, national policies and standards).

Challenges:

- **trust:** the challenge would be to develop a constitution that people can agree on and trust that it will not be changed too easily
- **overlap of structures:** there would be a time, perhaps measured in years, when there would be a national body and some state societies. This presents a number of risks until a critical size is reached
- **identity:** many societies are protective of their society's identity and would be reluctant to lose it. A solid constitution can protect this important element. Societies may legally need to wind up to implement this model, which is a big step
- **conflict over money:** there is a potential for significant conflict over finances as some societies have wound up to become part of a national organisation and others are still separate entities in their own right – a funding model would need to be well-researched, negotiated and agreed by all societies and IPEd before proceeding with this option
- **conflict over membership:** there is a risk that IPEd could compete with local societies for members: this can be avoided by including in its new constitution a ban on IPEd from recruiting members from societies while they exist, but automatically taking on their members when they wind up
- **staff and other activities:** it will be difficult to employ paid staff or to increase marketing without a formal agreement with societies who decide to remain as separate entities
- **equity:** IPEd will not be able to provide services on an equal level across all regions without a formal agreement with societies
- **volunteering:** societies depend on personal commitment and interaction, and these are believed to occur best on a local level. Societies struggling for volunteers now are unlikely to find an increase in enthusiasm with the move to a national body. There will also be a need to keep some level of a local committee (even if just a chaired local branch committee), with the result that the demands on volunteers will continue for some roles
- **member engagement:** this is related to volunteering. The potential for member disengagement is a significant risk for a new national body transitioning from a group of local bodies, and a specific strategy will need to be agreed before this model proceeds
- **legality:** advice from legal professionals and from ASIC will be needed (at least)
- **state/territory activities:** IPEd has suggested the merged societies could continue these activities, but with no indication of how this could be achieved
- **viability:** what do societies need to survive financially as 'local branches' and in terms of volunteer resources?

Direct membership model

This involves the dissolution of IPEd and the societies to form a new national body comprising individual editors as members.

Features:

- IPEd changes its legal structure from a company with six shareholders (the societies), to a more accommodating and inclusive structure that avoids the inflexibility of a company established under the Corporations Act
- a new body (perhaps called IPEd) with a new constitution is established
- societies join the new IPEd as they are ready to do so (they will need to wind up or amalgamate)
- the new constitution establishes societies as 'independent' entities (subcommittees or local branches) under the national body, with protection for their activities and their own names (if wanted), bank accounts, etc – to maintain the strong local involvement of their 'members'
- societies wind up or amalgamate with the new IPEd, becoming 'local branches' – they retain:
 - professional development and networking program (using national services for administration, e.g. venue hire)
 - member communication (newsletter content etc.)
 - budget allocation for society activities – for example, events (meetings and training), local content in the journal and website, member notices.
- IPEd manages all activities that are not local, to allow 'local branches' to maintain a strong local involvement in the new body

- possible to project a consistent professional image of editors nationally (membership criteria, accreditation, continuing professional development, national policies and standards)
- ability to afford more paid staffing to relieve volunteer directors and committee members of administration workloads, leaving editors to focus on strategic, high level representation of editors
- member services could be provided on a more equal level across all regions, regardless of member population
- more ‘clout’ and influence through size and an enhanced professional image.

Challenges:

- **trust:** the challenge would be to develop a constitution that people can agree on and trust that it will not be changed too easily
- **equity:** members in all regions must feel confident that their interests are equally recognised and addressed regardless of geographic location
- **money:** societies are understandably protective of the money they have raised. This is a sensitive issue. A way forward is for the new constitution to allow societies to keep their savings, but new funds are raised through IPed (the issue of debts also needs to be examined, if relevant). Societies will need to disclose their accounts in more detail to develop realistic financial models
- **identity:** many societies are protective of their society’s identity and would be reluctant to lose it. A solid constitution can protect this important element. Societies may legally need to wind up to implement this model, which is a big step
- **volunteering:** societies depend on personal commitment and interaction, and these are believed to occur best on a local level. Societies struggling for volunteers now are unlikely to find an increase in enthusiasm with the move to a national body. There will also be a need to keep some level of a local committee (even if just a chaired local branch committee), with the result that the demands on volunteers will continue for some roles
- **member engagement:** this is related to volunteering. The potential for member disengagement is a significant risk for a new national body transitioning from a group of local bodies, and a specific strategy will need to be agreed before this model proceeds
- **legality:** advice from legal professionals and from ASIC will be needed (at least)
- **state/territory activities:** IPed has suggested the merged societies could continue these activities, but with no indication of how this could be achieved
- **viability:** what do societies need to survive financially as ‘local branches’ and in terms of volunteer resources?

3.2 ANALYSIS OF MODELS AGAINST GOALS

The survey results showed board agreement against four goals:

- maintain the accreditation of professional editors
- maintain the *Australian Standards for Editing Practice*
- increase our visibility, which includes better marketing
- improve engagement at the local level with societies and with national issues and IPed

How well can the four models proposed by societies achieve those goals? Further analysis is required in terms of the goals and how to resolve the challenges of a preferred model.

Table 1: Are the agreed goals likely to be achieved by the models proposed?

Goal	Restructured IPed	Collaborative	Progressive	Direct membership
Accreditation	yes*	yes*	yes	yes
ASEP	yes*	yes+	yes	yes
Marketing	no	possible+	likely+	yes
Local engagement	no change	yes	likely+	likely+

Notes:

* These activities can continue, but long-term viability is not guaranteed without more resources

+ Success depends on increased local engagement and volunteer effort

Appendix: Other ideas suggested by survey respondents

The societies also had some good ideas that could be adopted, regardless of the model we move to (although some require better resourcing of IPEd):

Volunteer issues

- stop volunteer burn-out by engaging people who are not (or no longer) on society committees
- create a place at phone Council meetings for an Observer from each state. The places would rotate between committee members of each state society. Within a year nearly the whole committee would have experienced the impressive knowledge and good humour of Council members
- develop special interest groups

Advocacy and PR issues

- take on an advocacy role and with relevant unions, e.g. MEAA, work for standard rates of pay for editors, appropriate awards
- liaise with all national publishing bodies, the Australian Publishers Association, Book Industry Collaborative Council, Australian Society of Authors
- provide media releases and spokespersons on the importance of written communication in education
- more strategic use of the IPEd website to articulate editorial skills would help to promote editorial skills to employers and the community, if it connected with editorial services on individual state websites
- recognise and accredit the established, better-resourced courses of tertiary institutions in all states
- Investigate membership of the new book industry council established by the Federal government in June 2012. The Book Industry Collaborative Council to advise government on priority issues and oversee industry-led reforms. David Throsby, Macquarie Uni is chair. The Council has representatives from the peak bodies of publishers, booksellers, authors, literary agents, printers, library, research and communications sectors, unions and government. <www.booksellerandpublisher.com.au>
- establish a jobs clearinghouse, a national source for ads for editors

Financial issues

- give advice on contract negotiation (the Authors' society offers discounted legal advice)
- identify alternative sources of income for IPEd (other than Member levies and the AB exam) e.g. sponsorship, government lobbying, philanthropy.

Other issues

- tendering and pressure on government to update the Style Manual - it was last published in 1992 and that is not acceptable as a style guide to be used as a teaching tool and as a style guide for editors