OUTSOURCING ACADEMIA: HOW FREELANCERS FACILITATE THE SCHOLARLY PUBLISHING PROCESS

by

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Abstract

This report analyzes the use of freelancers in the scholarly production process at UBC Press. It examines rationales of finance, efficiency, and the ability to add value to scholarly books as the primary reasons behind the use of freelancers.

Section one contains the report's organizational and analytical framework and background information on publication processes unique to a scholarly press. Section two introduces UBC Press's production department and examines its current concerns pertaining to freelancers. Section three analyzes the Press's financial reasoning behind their use. Section four examines how freelancers lend efficiency to the production process and emphasizes how they figure within it. Section five determines how the Press's use of freelancers adds value to this same production process. Section six questions whether more Canadian university presses are using freelancers and examines the skills of UBC Press freelancers. Section eight offers conclusions and suggestions concerning the Press's future use of freelancers.

Dedication

To Roger Bird.

Acknowledgments

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1. Introduction: Organizational/analytical framework

> In times of old, knights travelled the countryside, hiring themselves out to fight
> battles on behalf of various kings and countries. These brave warriors carried
> weapons called *lances*. Because they were free of an ongoing commitment to any
> one employer, they were called *freelancers*.[1]

The use of freelancers at every stage in the scholarly publishing process is a relatively
new reality for Canadian university presses.[2] This report contains an analysis of the use
of freelancers at UBC Press, in particular, and determines just how this press benefits
from their use. Reasons of finance, efficiency, and added value are presented in order to
understand why the Press chooses to use freelancers. Having analyzed these rationales,
this report then provides suggestions pertaining to the Press's continued use of
freelancers.

Section one features background information on the nature of scholarly publishing
and presents the university press as an entity wholly distinct from its trade counterpart.
As not-for-profit ventures, scholarly presses largely owe their survival to government
grants and funding, which recognize and reward their efforts to break new academic
ground. Scholarly publishing is also unique from other types of publishing in that
manuscripts pass through an academic peer-review process, require little substantive
editing, and ultimately are approved or vetoed by the Press's publications board.

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[1] Susan M. Drake, *Freelancing for Dummies* (New York: Hungry Minds Inc., 2001), 7.
[2] For the purposes of this report, the term "scholarly publishing" refers to the not-for-profit publishing done
by university presses, as opposed to other forms of scholarly publishing.

Section two examines the production department at UBC Press.[3] Its reasons for holding both list and transmittal meetings are presented, and the roles and duties of the production editors in this department are examined. This section also delves into the production editors' current concerns, including whether to increase the freelance copy editor's role in the production process and whether to make use of more freelance project editors.

Section three analyzes UBC Press's financial reasons for choosing to use freelancers. Book budgets are seen to be heavily reliant on funding, but they may not actually serve to limit the amount of work freelancers put into their projects. The Press's spending on freelancers is then compared to the potential salaries of would-be in-house staff, and a conclusion is reached as to which option makes the most sense financially.

Section four uncovers how freelancers render the Press's scholarly publishing process more efficient. Focusing first on where freelancers figure in this process, this section then shows how the Press's production editors save time by booking freelancers in advance and being able to communicate their expectations to them at the outset to prevent problems from arising later.

Section five looks at how freelancers add value to the scholarly publishing process through their skills and expertise, which the production editors are able to draw upon, as needed. A diverse group of freelancers provides the production editors with opportunities to customize the work done on different scholarly monographs, including

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[3] The UBC Press's production department does not currently have an in-house designer, as do many similar departments. Formerly known as the editorial department, the production department was renamed when the Press's acquisitions department (composed of acquisitions editors) became the editorial department.

the Press's legal titles. Lastly, this section features an assessment of the Press's use of an in-house project editor as opposed to outsourcing more of these jobs.

Section six locates the trend of using freelancers within the context of Canadian scholarly publishing. It focuses on the recent historical shift that has resulted in more jobs being outsourced at university presses and examines which presses outsource what jobs. This section also lays out UBC Press's expectations when hiring freelancers, and features an analysis of their varied backgrounds and skills.

Section seven contains recommendations and a conclusion concerning the Press's use of freelancers. It revisits the production department's current concerns in relation to the expanded role of the freelance copy editor and the increased use of project editors. Suggestions are offered based on the previously discussed benefits freelancers bring to the Press – those being cost savings, efficiency, and value.

I conducted research for this report while working as an intern at UBC Press's production department from April to November 2005. During this period, I interviewed members of this department and sent email questionnaires to a range of freelancers as well as representatives of other Canadian university presses. (See Appendixes C, D, and E.)

Before determining how freelancers figure into and facilitate the scholarly publishing process, it is necessary first to examine the nature of scholarly publishing, in general. The following section features background information on this unique type of publishing.

1.1 Background: Scholarly publishing v. trade publishing

Scholarly publishing has at its heart a different reason for being than trade publishing. Publishers of scholarly journals set out to disseminate research conducted by, and usually written for, academics. Similarly, university publishers of scholarly books disseminate in book form research that is generally by and for academics. Though the intended audience for scholarly books is largely composed of professors and students alike, these books may also meet with a modicum of success in trade venues. The products of university presses are works that have been thoroughly researched and carefully executed in an effort to contribute to the advancement of original knowledge in a specific field. This unofficial mandate affords university presses the opportunity to occupy a niche within the marketplace, one which provides the literary and intellectual culture with a home outside the realms of trade publishing or in areas from which typical trade houses have retreated.[4]

Traditionally, university presses valued the dissemination of knowledge over the ability to generate revenue and, unlike their trade counterparts, they did not place a premium on sales within the trade. Therefore, the university press's ability to fill the needs of this primarily academic market did not automatically guarantee its ability to generate profits in doing so. If anything, university press publishers chose to publish works of academic merit while generally forgoing the profits enjoyed by trade publishers. Peter Givler (executive director of the Association of American University Presses) writes that, in theory, university presses sought to "fulfill the university's mission of serving the public good through education, rather than of maximizing profits, increasing

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[4] Albert N. Greco, *The Book Publishing Industry*, 2nd ed. (Mahwah, NJ: Lawrence Erlbaum Associates, 2005), 201.

owners' equity, and paying out shareholders' dividends."[5] As not-for-profit publishers,

university presses have typically been more concerned with producing quality academic

monographs than with the financial aspects of publishing. "The bottom line," Cathy

Davidson argues, "is that scholarly publishing isn't financially feasible as a business

model – never was, never was intended to be, and should not be. *If scholarship paid, we

wouldn't need university presses.*"[6]

But in today's climate of increased competition and the resultant diminishing

sales, university presses are feeling the need to justify the publication of scholarly books

based on their potential sales performance. According to the MLA Ad Hoc Committee on

the Future of Scholarly Publishing, "university presses have seen their parent universities

withdraw the subsidies that once formed the bedrock of their financial operations."[7] As

with all academic costs, the cost of scholarly publishing is rising and is more likely to

lose money the more serious, rigorous, and specialized it is.[8] Trends in academic book

publishing indicate "university publishers are facing a financial crisis, outlets for research

monographs are drying up, print runs are being reduced and monograph costs are

increasing."[9] Whereas university presses of the past may not have been greatly concerned

with the potential sales of titles, there is now a greater emphasis on a press's bottom

line.[10] As Givler notes, "publishing is a hybrid business. It is a vital cultural enterprise

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[5] Peter Givler, "University Press Publishing in the United States," in *Scholarly Publishing: Books, Journals, Publishers, and Libraries in the 20th Century*, eds. Richard E. Abel and Lyman W. Newlin (New York: John Wiley, 2002), 110.

[6] Cathy N. Davidson, "The Futures of Scholarly Publishing," *Journal of Scholarly Publishing* 35, 3 (2004): 131.

[7] MLA Ad Hoc Committee on the Future of Scholarly Publishing, "The Future of Scholarly Publishing," *Journal of Scholarly Publishing* 34, 2 (2003): 67.

[8] C. Steele, as quoted in G.E. Gorman, ed., *Scholarly Publishing in an Electronic Era* (London: Facet Pub., 2005), 133.

[9] Gorman, *Scholarly Publishing*, 49.

[10] MLA Ad Hoc Committee, "Future of Scholarly Publishing," 67.

that nourishes the creative use of language and the growth of new ideas, and at the same time, it is an ordinary business with payrolls to meet and bills to pay."[11]

The University of British Columbia Press (UBC Press or "the Press") is an example of a typical not-for-profit scholarly publisher in that it seeks to publish books that make an original contribution to an existing body of scholarship. It has found considerable success in strategically occupying a niche devoted to titles in political science, military history, Native studies, law and society, and environmental studies. The Press is now considered Canada's leading social sciences publisher and expects to publish between 55 and 60 titles in the coming fiscal year and up to 70 titles per year in the next three years.[12] In the 1990s, it became an agent for other Canadian, American, and British academic presses (promoting and distributing their books in Canada) and it has seen its sales increase to reflect these new alliances. The Press's July 2005 sales figures show its combined sales, which include agency titles, to have increased by 5 percent over those from the same time period in 2004, and its sales of UBC titles to have increased by 15 percent.

Despite this recent sales growth, however, the Press recorded the relatively modest profit of almost $3,000 in the 2004-2005 fiscal year (after grants).[13] Thus the Press, like most Canadian trade book publishers, continues to rely on grants and funding to help sustain its publishing program, in addition to financial support from UBC.

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[11] Givler, "University Press Publishing," 110.
[12] UBC Press, "Aid to Publishers Business Plan, 2005-2006" (Vancouver: UBC Press, 2005), 1.
[13] 2005 fiscal year-end numbers, presented at the UBC Press annual retreat, 6 October 2005.

1.1.1 Grants and funding

University presses are now under great pressure to make profit-based decisions, in part, due to an increase in operational costs and a decline in subsidies.[14] As Patricia Demers notes, "Canadian scholarly presses often do not have the funds to publish a scholarly work without subsidy and alternate sources of subsidy are difficult to come by."[15] Financial sustenance for Canadian scholarly publishers takes various forms. In the early 1940s, the Canadian Social Science Research Council and the Humanities Research Council of Canada founded the Aid to Scholarly Publications Programme (ASPP) to promote Canadian scholarship. In the early 1990s, however, the ASPP underwent cutbacks and slashed grants. The publishers of scholarly journals and scholarly monographs have been continuously under pressure since.[16] Currently funded by the Social Science and Humanities Research Council of Canada (SSHRC), the ASPP helps support over 60 Canadian publishing houses that produce scholarly works, university presses among them.[17] To qualify for ASPP funding, works must be deemed to make an original contribution to knowledge and to unlikely be self-supporting.[18] Traditionally, single-author scholarly monographs stood a greater chance of receiving ASPP funds than collections/complex books – scholarly books with a number of contributors and potential illustrations or large numbers of tables and figures. But SSHRC money is now going to fund collections/complex books as well, if their editors can "demonstrate a cohesive

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[14] MLA Ad Hoc Committee, "Future of Scholarly Publishing," 65.
[15] Patricia Demers, ed., *Scholarly Publishing in Canada: Evolving Present, Uncertain Future* (Ottawa: University of Ottawa Press, 1988), 26.
[16] Paul Aubin, et al., ed., *Scholarly Publishing in Canada and Canadian Bibliography – Selected Papers on Two Themes* (Montreal: Association for Canadian Studies, 1993), 11.
[17] Canadian Federation for the Humanities and Social Sciences, "About CFHSS: History," http://www.fedcan.ca/english/aspp/about/history/ (accessed 24 August 2005).
[18] Canadian Federation for the Humanities and Social Sciences, "Information for Assessors," http://www.fedcan.ca/english/aspp/assessors/ (accessed 27 August 2005).

theme and ongoing collaboration between all members of the team throughout the writing of the contributions."[19]

Although most UBC Press books receive ASPP funding, it is by no means a given and should a potential title fail to receive this source of funding, it stands a lesser chance of ultimately being published. The Press's acquisitions editors apply for ASPP funding for most titles that lack independent funding (monies from funding sources arranged by the author), and the current average ASPP grant is roughly $7,000 per title. Jean Wilson, the Press's associate director – editorial, has noted that many authors would like the Press to avoid applying for ASPP money on their behalf because the application can take a long time to go though, which tends to slow up the overall publication process. But, she adds, this process "is a reality that most authors cannot afford to easily forgo."[20] The Press's Asian studies books, for example, are notoriously hard to find funding for as most of their authors are not Canadian citizens or landed immigrants – an ASPP qualification. However, the ASPP recently announced a $500,000 increase in available funding, which will likely translate into per-book grants of $8,000 (instead of $7,000) as well as a greater number of books being considered eligible to receive funding. During the 2004-2005 fiscal year ending March 31st, the Press received $231,000 in ASPP funding, to be applied against production costs for 33 of the 54 titles published in that same period.[21]

UBC Press is a financially viable university press headquartered in Canada that is at least 75 percent Canadian-owned and -controlled. As such, the Press qualifies to receive annual funding from the Department of Canadian Heritage's Book Publishing

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[19] Paul Aubin, et al., ed., *Scholarly Publishing in Canada*, 17.
[20] Jean Wilson (Associate Director – Editorial), in discussion with the author, July 2005.
[21] 2005 fiscal year-end numbers, 6 October 2005.

Industry Development Program (BPIDP).[22] BPIDP awarded the Press over $145,000 last year, not including funds from the Association for the Export of Canadian Books (AECB). Other monies and financial contributions included over $78,000 in block grants from the Canada Council for the Arts and the BC Arts Council.[23]

Lastly, most of the internal funding the Press receives is from endowments that were established 30 years ago and are managed by the university. It is able to access five percent on the principal each year that totalled almost $125,000 last year, which is down from $210,000 in 2001.[24] The Press's only direct funding from the university is the K.D. Srivastava Publications Fund, which was established in 1995 after the university withdrew an annual $250,000 grant to the Press. Named after the former Vice President, Academic and Student and Services responsible for the revitalization of UBC Press, the K.D. Srivastava Publications Fund was established at $50,000 but is now $48,500. In addition, UBC Press launched the K.D. Srivastava Book Prize in 2003 using a portion of the funding. Authors eligible for the $1000 annual prize will "have completed a substantial portion of the work at UBC either as a faculty member, visiting professor, doctoral student or post-doctoral fellow."[25] Overall, during the 2004-2005 fiscal year the Press received over $819,000 in grants and funding, equivalent to roughly 42 percent of the Press's total revenue for the year.[26]

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[22] Canadian Heritage, Book Publishing Industry Development Program, "Aid to Publishers: Eligible Publishers," http://pch.gc.ca/progs/ac-ca/progs/padie-bpidp/pubs/2005-2006/atp/3_e.cfm (accessed 27 August 2005).
[23] 2005 fiscal year-end numbers, 6 October 2005.
[24] Ibid.
[25] UBC Press, "Announcing the K.D. Srivastava Book Prize," Press Release, 11 May 2002.
[26] 2005 fiscal year-end numbers, 6 October 2005.

1.1.2 The peer-review process

Scholarly presses that have received funding from government bodies or their affiliated universities are in a better position, financially, to begin the publishing process. Whereas trade publishers may conduct a lengthy, and occasionally arduous, search through the "slush pile" for suitable manuscripts, scholarly presses acquire them in a slightly different manner. UBC Press tends to receive manuscripts "over the transom," by which potential authors contact one of the Press's three acquisitions editors based in Vancouver, Kelowna, or Toronto to express an interest in having the Press publish their work. The editor then requires the author to submit a proposal containing background information on his or her manuscript such as an abstract, a chapter-by-chapter breakdown of their work, page count, word count, and information concerning whether they have any funding available to them to aid in the publication process. The Press holds acquisitions meetings about every two weeks in which all the acquisitions editors put forth their most recent submissions for group discussion. A manuscript's merits are carefully weighed against its weaknesses, and editors take pains to point out any pitfalls that may unduly affect its publication, including a potential lack of funding.

Those manuscripts the Press deems worthwhile to pursue go directly into peer review. The job of seeking out academics willing and capable of reviewing manuscripts also lies with the acquisitions editors. Although they used to be responsible for securing only one reader and the ASPP the other, editors are now allowed to source out both readers under new ASPP guidelines determining funding eligibility. This freedom to choose both their readers grants editors more control over the peer-review process as a whole. Editor Jean Wilson conducts a "reader search" in which she either considers

whom among her stable of stand-by readers may be a good fit for a manuscript or seeks

them out by searching various university websites. While searching for would-be readers,

an editor considers whether they possess any innate biases or political or philosophical

differences with the author that may adversely affect their ability to give an objective

review of the manuscript.

Once a suitable reader is found, an acquisitions editor generally contacts them via

telephone or email, or both, to request they commit to reading the manuscript in question.

Should they agree, the author's name is released to the reader along with the manuscript,

unlike the "blind-review" system common in scholarly journal publishing in which the

readers are not told the name of the author. The Press's acquisitions editors require peer

readers to assess manuscripts with an eye for the following: whether it is in a publishable

state, currently; whether the author is saying something new; whether it is a contribution

to scholarship and its field; and lastly, whether it is well written, with enough relevant

examples to back up the author's arguments.[27] This assessment provides for both

publisher and author, as Patricia Demers notes, "the critical book review before

publication, while there is still time to take account of the criticisms."[28] Should one reader

give the manuscript a positive review and the other a negative one, the acquisitions editor

must then call in a third reader to serve as a tie-breaker. Readers receive either a nominal

sum or some books for their efforts.

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[27] Wilson, discussion.
[28] Demers, *Scholarly Publishing in Canada*, 22.

1.1.3 A "lack" of substantive editing?

One major difference between trade and scholarly publishing is the latter's so-called lack of substantive editing in the publication process. Although peer reviewers do not perform substantive editing in the traditional sense, in answering the aforementioned questions about a manuscript they may become attuned to problems of structure or logic within it. The peer-review process assures that the ideas within a manuscript are at least presented in a logical fashion. UBC Press acquisitions editors do not require or even wish reviewers to spot spelling errors or point out typos as their task should not require that level of detail. And, in general, substantive editing is also a non-issue for most of the Press's books. An acquisitions editor may do some aspects of substantive editing such as cutting an extraneous introduction or merging chapters. However, they simply do not have the time required to perform these substantive tasks on every manuscript, let alone the time to read it. As opposed to a substantive editor, the acquisitions editor may be best described as a "sponsoring editor," with "the broadest, most general responsibility for each book, from the time that it is signed to the time it is declared out of print – from birth to death so to speak."[29]

The one production editor at UBC Press who may on occasion do what resembles substantive editing is Camilla Blakeley, the Press's project editor in Toronto. The role of project editor requires that Camilla periodically edit a manuscript herself, at which time she will usually perform stylistic editing to clarify meaning, eliminate jargon, and

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[29] Walter W. Powell, as quoted in Sanford G. Thatcher, "The Value-Added in Editorial Acquisitions," *Journal of Scholarly Publishing* 30, 2 (1999): 62.

improve the flow of ideas.[30] Otherwise, substantive editing does not play a role in the

Press's scholarly publishing process.[31]

1.1.4 The publications board

Once the acquisitions editor has received two positive peer reviews back from their

readers, the manuscripts are ready to be presented to UBC Press's publications board, or

editorial board, as it is sometimes known. The publications board consists of faculty

members from a variety of disciplines who meet with the acquisitions editors on a usual

basis to discuss the manuscripts under consideration. In order to reach a decision, they

take into account external factors such as the recommendations found in the readers'

reports, which they weigh against their own subject-matter expertise and scholarly

knowledge derived from having established reputable careers in the world of academia.

An editor from Yale University Press described the role of the board as the following: "to

identify the absence of quality – to pluck the remaining weeds out of the bouquet that the

editors bring to each meeting."[32] Ultimately, publications board members possess the

power to approve or veto manuscripts and generally mandate whether or not the Press can

proceed with their publication at this stage. As Ed Tripp notes, "the main function of a

university press's editorial board is to review the proposals submitted to it by acquiring

editors who are seeking its authorization to publish books that will bear, through the

press's imprint, the university's seal of approval."[33]

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[30] Professional Editors Association of Vancouver Island (PEAVI), "What Editors Do," http://peavi.bc.ca/what_editors_do.htm (accessed 19 November 2005).
[31] Camilla Blakeley (Project Editor), in discussion with the author, June 2005.
[32] Ed Tripp, as quoted in Thatcher, "The Value-Added in Editorial Acquisitions," 69-70.
[33] Ibid., 69.

The UBC Press publications board has been active since 1989 and holds bi-monthly meetings. It is currently composed of eight UBC faculty member scholars and the chair – all of whom have been selected by the President of UBC to serve for an indefinite term. Before each meeting, individual members are each assigned an "Approval to Publish" package from different authors that contain the following documents for each manuscript to be reviewed: an introduction, a table of contents, a general description, a bibliography, the two readers' reports, and the author response to these reports.[34] Having read the packages, members then provide their own opinions as to whether they recommend the manuscript be published or not and initiate discussion among the other members, many of whom may have read the package as well. The board then decides to make one of four potential recommendations for the manuscript – a unanimous decision of complete acceptance; publication with changes based on the author and acquisitions editor's help, which constitutes provisional acceptance; or that it be revised and resubmitted for board review in future, should the manuscript have potential yet require structural or editorial changes.[35] It is rare that the board rejects a manuscript outright.

2.1 The production department at UBC Press

2.1.1 Meetings: List and transmittal

Once the publications board accepts a scholarly monograph or collection for publication, the manuscript is informally handed over to the Press's production department, which goes by the name of "production." This department is made up of three production

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[34] Alison Cairns, "An Analysis of the Operation of the University of British Columbia Press with an Emphasis on Scholarly Editing," MPub report, Simon Fraser University, 2005, 43.
[35] Ibid., 46.

editors in the Vancouver office and one project editor who works out of her home in Toronto. Members of the production department attend seasonal list meetings in which the spring and fall lists are determined in conjunction with the acquisitions editors and the Press's director. When the spring and fall lists have been finalized, the production department then holds workflow meetings to determine which production editor will take on which manuscript during the coming season.

The following factors are considered when divvying up the list: whether or not the manuscript is a collection, which automatically renders it a more time-consuming project; whether the manuscript contains a variety of tables and figures, meaning additional time will have to be set aside for analyzing and getting proper digital files and securing of necessary permissions; whether the author is a known entity to the department, and if so, how easy they are to deal with; whether it needs to be handled by the in-house project editor, and lastly, but perhaps most importantly, how many other projects each production editor will be managing simultaneously over the same time period in an attempt to get them all out at once. The production editor then begins working on the initial clean-up of the manuscript, which involves compiling the manuscript and tagging any additional elements, such as tables and figures, according to house style and just generally getting the document ready to go into copy editing, the following stage.

Sometime during this initial, informal assessment of the manuscript, the production department will hold a transmittal meeting, in which the acquisitions editors formally "transmit" or pass along the manuscript to the production department. Prior to the meeting, the acquisitions editor completes a transmittal form containing all the pertinent details concerning the publication of the manuscript, including the availability

of any grants or funding, print runs, co-publication potential, necessary edits, whether the author will prepare the index, details concerning cover design, and its importance or complexity. Every manuscript the Press takes on is given a "low," "medium," or "high" ranking in terms of importance or complexity. A title with a high level of importance, for example, may be expected to generate greater "buzz" and ensuing sales than others, and a title with a low level of complexity may be a standard scholarly monograph the production editors feel they can move quickly through the production process, without any anticipated difficulties.

In consultation with the acquisitions editors, who are generally quite familiar with the manuscript at this point (regardless of whether or not they have read it), the production department determines the necessary plan of action for a particular title in terms of production. The transmittal meeting is an opportunity for them to decide what they will be able to do with the book and how it fits within the Press's expectations. Members of the Press's marketing department are generally in attendance, as is the Press's director, in order to receive information about the book's top three selling points, what is special or unique about it, and how it fits into the list.

2.2 In-house staff: The production team

The Vancouver office production department is made up of Holly Keller, assistant director – editorial and production services; Ann Macklem, editor; and Darcy Cullen, editor. Camilla Blakeley, project editor, is the fourth member of the department who works out of her home in Toronto. As a whole, the production editors tend to focus the bulk of their time managing the manuscripts from the time they are transmitted by the acquisitions editor to when they ultimately end up in book form. Before the production

process can begin, production editors must first assess the management of the project. They decide which freelance copy editor among their stable of available freelancers will be best suited for the project, they subsequently assess the editing upon its completion, and they then send the manuscript to the author to review the copy editor's comments, and make any additional changes to the manuscript before it is typeset. Overall, they're "constantly making sure that everything is coherent, from start to finish, and consistent" in order to ensure a standard for the press and to prevent anything unexpected from happening during the production process.[36]

In the Vancouver production department, Holly is the manager who splits her time between procedural duties, such as assessing manuscripts in order to determine which list they should be on and finalizing print runs, as well as administrative duties such as managing a book's financials or updating the Press's house style sheets. She also attempts to become relatively familiar with the books, as she tends to coordinate the choice of cover designers and of the book design itself. Ann's duties as editor include making up the production report detailing which books are at what stages of the production process, as well as their potential publication dates. She is also responsible for updating Press Track, the Press's bibliographic-data management software that also contains limited author-contact and marketing information. And she'll track books at the Press's printer as well as manage shipments when they arrive in house.

Like Ann, Darcy is an editor but she is in charge of securing and arranging co-publication agreements and, along with members of the marketing department, of determining which titles will be reprinted in what quantity. As the Press's in-house

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[36] Darcy Cullen (Editor), in discussion with the author, June 2005.

project editor, Camilla takes on atypical titles such as books about art or fashion featuring numerous illustrations, or important trade titles. It is her job to oversee these projects, which may involve sourcing photos and commissioning illustrations. However, she usually copy edits these books herself.

All four production staff are required to attend meetings – Holly attends all transmittals, and Darcy attends reprint meetings – as well as to write cover copy and liaise with authors via telephone, email, and occasionally in person. The production editors are also responsible for providing job training to any interns and work-study students that have been taken on to assist the department. Another job they are all equally responsible for is the coordination of freelancers – for their own projects as well as those the other department members may be working on. As a former freelance indexer herself, Ann tends to contact and arrange for the use of indexers; Darcy, the other editor, may have more frequent interaction with freelance proofreaders; and Holly, the manager, is generally in touch with the cover designers and typesetters. The three of them may meet on occasion to decide, as a whole, which freelancers will be used for which project. As she is located in Toronto, Camilla tends to pull from her own pool of freelancers.

2.3 Production's current concerns

On 11 August 2005, a production workflow meeting was held to determine who would be taking on which titles for the spring 2006 list, which had just been confirmed. Of particular concern was the size of the spring list and how the production editors were going to handle the impending volume of workflow. At the time of this meeting, roughly 17 titles had been confirmed for the spring list and nine were considered "iffy" by the fact

that most of these manuscripts had not arrived and some had yet to secure ASPP funding. A total of 26 potential titles made the 2006 spring list the Press's largest to date.

Yet the production department remained steadfastly committed to producing books of a certain quality. Although the production editors felt increased pressure to render the department more efficient, they were still trying to maintain a level of quality in their publications that had become synonymous with UBC Press. The production editors were willing to go the extra mile for quality by producing books free of typographical errors with attractive, modern cover designs. In order to finance a certain level of quality in proofreading and design, the production department kept costs down by forgoing dust jackets and four-colour cover designs in favour of laminated covers with fewer colours. It also chose to run bookmarks on the soft cover print run but tended to hold off on soft cover print runs altogether until after the hard covers have sold through to libraries.[37]

By the fiscal year ending 31 March 2005, the Press had published 54 new hard cover editions, or 88 new editions total, including paperback releases. The Press had also sought to boost its reprints in an effort to reduce initial print runs.[38] If the Press was to achieve its goal of publishing between 55 and 60 new hard cover titles in the 2006 fiscal year, and up to 70 titles over the next three years, the production editors realized they would have to change the following aspects of their traditional production processes: scheduling, the role of the copy editor, and the use of freelance project editors. And that any changes to these processes would not affect the quality of books being produced.

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[37] Holly Keller (Assistant Director – Editorial and Production Services), in discussion with the author, November 2005.
[38] UBC Press, "Aid to Publishers," 2.

2.3.1 Scheduling

During the August workflow meeting, the production editors discussed the idea of increasing the time allotted to getting books through the production process. At that time, they used one of two schedules to determine how long the book would be in production. The "regular" schedule is the one most often assigned to typical scholarly monographs – when authors ask the acquisitions editors how long it will take for the book to come out, for example, they are given the standard answer of eight months. (See Appendix A.) The "fast" schedule is used for less complex books, ones that do not contain lots of tables, figures, and illustrations, and ones that are "hot" – either time sensitive or high profile. These schedules had been devised in the mid-1990s, when there were fewer books on each list. At that time the Press was more desperate to attract or get books on a list.

Holly, the manager, proposed the department increase the length of the regular schedule up to nine months as well as formalize the fast schedule at six or seven months (it had theoretically been five-and-a-half months). Conversely, she also introduced a "collections/complex" schedule for multi-author collections or complex books that tend to eat up a lot of an editor's time in production. These books necessitate production editors deal not only with the collection's editor(s), but with the contributing authors as well. This new collections/complex schedule would be ten months long.

There were several reasons behind the decision to increase the length of the book schedules. Firstly, by increasing the schedules the production editors hoped to spread out the calendar time they could devote to one title, which may allow them to manage multiple titles with greater ease. These new schedules would have the added effect of building in so-called "backburner" time, which would also allow the production editors to

spend more time managing high-priority books while those of lesser importance that could feasibly afford to wait could do so without disrupting the schedules of other books.

Lastly, the production editors hoped the new schedules would curb the amount of late books coming out of production – books that invariably miss their proposed publication dates. Currently, some books come out late due to the number of titles with which they must compete for an editor's time. They also must compete for the attention of a limited number of copy editors and indexers so it is better if they are staggered. Stemming the output of late books would also serve to placate some authors who may occasionally question why the press is running behind schedule, for example, or why their title has not come out by the time the acquisitions editor had assured them it would. Complicating concerns further was the overarching worry that any books that did not make it on the spring 2006 list would ultimately get bumped back to the fall 2006 list, which would then swell under the pressure of the newly added titles.

In addition to lengthening the schedules, the production editors hoped to revisit the spring and fall lists' respective cut-off dates – or the dates by which the manuscripts must be submitted to production in order to make it on the list for the following season. Traditionally, fall lists have been bigger than spring lists, resulting in more work for the department during the period leading up to this season. The current fall cut-off dates are in early February for collections/complex books with lots of illustrations and early March for the more straightforward scholarly monographs. Spring cut-off dates are the beginning of August for collections/complex books and the beginning of September for monographs. Should they bump up these cut-off dates, the production editors would then

have more time to get the books through production. Acquisitions editors could also put more pressure on authors to submit manuscripts earlier to make a list.

2.3.2 The role of the copy editor

The traditional role of the copy editor involves catching errors of spelling, grammar, style, punctuation, and "repetitions of wording, the recurrence of an anecdote or quotation, and larger redundancies. To do this, and to do it well, a copy editor essentially carries the entire manuscript around in her head for the period of time she's working on it."[39] UBC Press currently gives a freelance copy editor about four weeks to edit the average manuscript (110,000 words or 288 final pages). The copy-edited manuscript is then returned to a production editor who sends paper copies to the author for revision. The author, in turn, is expected to respond to any queries posed by the copy editor or to provide a rationale or explanation of any points for which the copy editor required clarification. Generally, the authors handwrite their responses in the margins of the hard copy, in varying degrees of legibility.

The author then returns the manuscript to the production editor who may manually input author comments into the digital file of the manuscript herself or have a work-study student or summer intern do this job for her. Depending on the amount of author responses, length of the manuscript, and legibility of the handwriting, the process of inputting author comments can take anywhere from several hours to a couple of days. It also necessitates that any production editor responsible for doing so make the

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[39] William Germano, *Getting It Published: A Guide for Scholars and Anyone Else Serious about Serious Books* (Chicago: University of Chicago Press, 2001), 174.

additional mental effort of having to get back into the book after having temporarily relegated it to the copy editor.

During the August workflow meeting, Holly, the manager, proposed making freelance copy editors responsible for inputting author comments into the digital file for some projects, as opposed to having someone at the Press do this work in house. She cited two potential benefits to outsourcing this chore – first, the copy editor is in a better position than a production editor to judge whether the author's suggested changes or responses are suitable or problematic. And second, relieving themselves of this duty would free up the production department's editors further by allowing them greater flexibility to focus on other tasks and better stagger their schedules.

Making this change, however, would require accounting for the amount of time the copy editor would have to not only copy edit the manuscript, but to send it to the author for responses, to wait to receive the manuscript back from the author, and then finally to input the author's responses themselves, thus readying it for typesetting. It was also discussed that this same freelancer would be responsible (with the author) for proofreading. The production editors speculated whether this entire process could be done within a seven-week period. They also wondered whether choosing to have freelancers take on this task would not cause them to lose a bit of touch with the author, on a personal level, which the author may have come to expect in his or her dealings with academic publishers. And who, besides the author, would be charged with monitoring the copy editing that has been done on the manuscripts? The argument about "the more eyes, the better" was also used against this plan.

2.3.3 The project-editor dilemma

The last issue to have been discussed at the August meeting concerned the Press's use of freelance project editors. Due to the increased number of titles on the spring list, the production editors wondered whether they should not hire another staff member to help them make it through busy seasons ahead. Holly proposed that instead of hiring another person for production they should consider using more project editors to take on some of the standard scholarly monographs. Camilla seemed to think it essential that the production department do this, especially if the Press would not be hiring a new in-house staff member for the production department. Traditionally, as an in-house project editor, Camilla is the one who takes on the more complex, art-related and trade books and oversees their entire production while assuming their copy-editing duties herself. The suggestion to use more freelance project editors could extend to the exact opposite type of book that Camilla generally handles – the standard scholarly monograph.

The production editors were a bit concerned, however, with several issues surrounding the use of freelance project editors. Firstly, they wondered just who they could find to fill these roles. Currently, they had only used two very experienced copy editors to act as freelance project editors for complicated books. They all seemed to agree that, although they would prefer to continue using experienced project editors, less experienced freelancers would surely become more effective over time, despite their likely need for more initial attention. It might also be a good idea to start any new freelance project editors off on some of the low-priority books. Camilla also suggested bringing them in during the later, more mechanical production stages in order to manage some of the less complex duties such as proofreading.

The sheer number of variables incumbent on any book requiring a freelance project editor would make it difficult for the production editors to pick one solution to suit all projects. Project editors could be used more often depending on their suitability to work on the books in question. Because every book is different, however, the production editors worried that quality would suffer if they were to apply the same rule to all projects.

Finally, the talk turned to budgets. Darcy, the editor, wondered whether the prescribed freelance project-editor budget would have to be expanded to allow for the fact that the project editor would be proofreading the manuscripts as well, especially if the production department would not be hiring someone else to proof them. Currently, the portion of the total budget of project-editor books dedicated to proofreading is roughly $300-$400, as opposed to the usual $700-800 the production department pays a separate freelancer to proofread other books that are not being overseen by a project editor. Camilla pointed out that she would not want to proof her own work, as a project editor, and that production should continue paying freelance proofreaders to proofread the books that are being handled by project editors.

By the end of the meeting, the production editors had reached the following conclusions: the new, longer book schedules would allow them to better stagger their personal schedules to deal with the increased workload; no decision had been made as to whether freelance copy editors should, in fact, be responsible for entering author comments on top of their regular editing duties; and lastly, that should they decide to hire more freelance project editors on occasion, the project-editing budget would have to be revisited to determine how they should be paid – at a flat rate or by the hour – and

whether this budget would have to be increased to account for the additional proofreading

task.

3. Making sense of freelance dollars

In order to ultimately aid in answering some of the questions concerning whether UBC Press should broaden the role of the freelance copy editor and decide to hire more freelance project editors when suitable, this section will first examine some of the rationale behind the Press's current use of freelancers in general. It includes an analysis of the financial reasoning that has resulted in their widespread involvement in virtually every aspect of the production process. This section will also examine how freelancers' budgets are dependent upon the Press receiving varying degrees of funding and how some freelancers tend not to let budgets restrict the amount of effort they commit to a project. Lastly, it features a comparison of freelancers' fees versus the salaries earned by their in-house counterparts and a look at how much money UBC Press actually spent on freelancers in the previous fiscal year. In sum, this section will conclude whether the Press's use of freelancers is a financially viable option, after all.

3.1 The financial rationale behind hiring freelancers

UBC Press's primary reason for using freelancers is financial. Everyone at the Press seems to agree that hiring freelancers as needed makes more financial sense than hiring full-time, in-house staff members to do the same jobs. As the size of the Press's output continues to grow, so too does the number of specific tasks in the production process that a production editor must complete, for each title, within budget and without sacrificing quality.

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Hiring freelancers allows the Press's production editors to buy time in blocks.[40] As opposed to hiring someone in house to be permanently on hand and available to complete a task such as copy editing whenever the need arises, the production editors now view this task as a single block within a series of blocks of time comprising the production process for one title. By dividing up the production process into a series of tasks, each with their own allotted block of time, production editors can purchase the time of freelancers as required. The regular, fast, and collections/complex schedules mentioned earlier each list a designated amount of time for the completion of specific tasks – getting the manuscript to and from the copy editor, typesetter, and proofreader, for example. (See Appendix A.) Although the length of time accorded these tasks varies according to the type of schedule and book in question, all of these tasks are considered discrete parts of the greater production process as a whole. This process can be considered an example of functional management, which features an assembly-line method of production. Using freelancers to complete these tasks at various stages in the production process is a cost-effective alternative to hiring the amount of staff members that may otherwise be needed to complete them.

Another financial reason for the use of freelancers at UBC Press concerns editorial tasks done in house. Jobs such as copy editing and proofreading require an editor spend long, undisturbed periods of time pouring over the minutiae of a manuscript's text. As the Press's production editors tend to manage a variety of production-related tasks simultaneously while constantly having to answer emails and phone calls in the process, they simply could not choose to devote long periods of time to

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[40] Peter Milroy (Director), in discussion with the author, July 2005.

any one task such as editing, even if it were done in house. If the production department's editors were to perform copy editing in house, the sheer number of interruptions they would likely experience would probably draw these jobs out over a longer period of time than necessary, resulting in a higher cost per job. Overall, it is cheaper for the production editors to hand these jobs over to freelancers to complete over a set period of time, and within a set budget, as we shall see in the following sections.

3.2 Relying on funding to determine freelance budgets

"Subsidy has always been important in scholarly publishing. Revenue from the sale of between five hundred and fifteen hundred copies of a book is rarely sufficient to cover such one-time costs as proofreading, editing, press-preparation, design, photo-compensation or typesetting and printing."[41] Besides the BPIDP and Canada Council block grants mentioned earlier, the single biggest grant that has a direct impact on whether a particular title makes it to print at UBC Press is the Aid to Scholarly Publications Programme. Unlike BPIDP and Canada Council grants, ASPP grants must be applied for on a per-title basis. As mentioned earlier, most of the Press's books do get the current $7,000 ASPP grant, which goes directly to reducing the production – and freelance – costs associated with that title.

Costs such as indexing, however, will only be assumed by the Press if an ASPP grant plus other funding has been received. The Press typically pays freelance indexers a set rate per "indexable" page to create an index. Otherwise, the author must agree to either do their own index or pay a freelance indexer to make one for them. The author

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[41] Canadian Federation for the Humanities, *A Guide to Scholarly Publishing in Canada*, 4th ed. (Ottawa: Canadian Federation for the Humanities: Social Science Federation of Canada, 1986), 16.

makes this decision towards the end of the production process when "by now he is exhausted and might well see [the option to use a freelance professional indexer] as the best, even though it will cost him several hundred dollars – maybe even more than his royalties."[42] As a result, many indexers have fewer qualms about raising their rates more frequently than other freelancers because the production editors will tend not to dispute these increases on their authors' behalf. Requiring authors to compile their own indexes has become a standard practice for scholarly editors. "But how many of us would be willing to add an indexer to our staff, [or] refuse to accept indexes that authors prepare themselves ... and have each author pay a fee to cover a portion of the staff indexer's salary?"[43] The answer is that very few presses, presumably, could afford to take on in-house indexers full-time.

Other freelance budgets affected by funding include cover and text design. The more money a title has received in funding, the more money may be available to designers to get creative and opt for the use of colour on the cover or buy a (royalty-free) image for the same purpose. Additional funds permitting, the Press's production editor may also choose to have typesetters deviate from the Press's standard scholarly monograph text-design template in *Stone Serif* and to go with a different, and presumably more expensive, design if she thinks the book would merit this extra treatment. Extra funding also allows the production editor to resolve the issue of whether or not an author will be responsible for paying for the use of illustrations or for the fixing of figures to render them book-ready.

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[42] David Henige, "Indexing: A Users' Perspective," *Journal of Scholarly Publishing* 33, 4 (2002): 234.
[43] Fred Kameny, "Authors with Deep Pockets: The Ethics of Subsidies," *Journal of Scholarly Publishing* 29, 2 (1998): 67.

Lastly, the Press requires extra funding for co-publications done in conjunction with museums such as the Royal Ontario Museum (ROM) and the Museum of Civilization. Museums will occasionally solicit bids for projects of interest to the Press, in which case the Press will promise them a "deluxe-package" treatment coordinated by the in-house project editor. Although this system allows the Press to sell its publishing skills as a package, it requires the partner to contribute additional funding (beyond any ASPP funds) to help finance the project and to allow the Press to break even on these books.[44]

3.3 Working beyond the budget: How freelancers may or may not be constrained by assigned budgets

When a UBC Press production editor hires a freelancer to complete a particular job she will issue a set budget for the work. Before assigning the budget, the production editor tries to estimate the budget on how much work the copy editors, for example, think they "can get done per hour, if it's a heavy edit or a short edit, and then the length of the book."[45] The budget may also include an hourly rate or be broken down based on the number of hours expected for the work to be completed within a given time. The freelancer, as a professional, is then left to decide how much of the job they can then accomplish within that time period.[46]

Assigned budgets usually ensure freelancers do not go overboard in doing something they were not asked to do. Holly, the manager, recalled one copy editor who spent little time actually editing the text but spent days verifying the text's many web

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[44] Keller, discussion.
[45] Cullen, discussion.
[46] Blakeley, discussion.

sources – a job normally reserved for the book's author. Budgets serve as a resource for freelancers, which allow them to check periodically during their work that they are staying within the amount of money they have been assigned to do the job for.[47] However, the Press's production editors feel that most freelance copy editors are a conscientious group who may tend to do more work than they are paid to on a particular project. As a former freelance editor herself, Holly admitted that in her experience it is in a copy editor's nature to "want to do a good job ... [and] get it right, regardless of our budget," which results in cost savings for the Press but may also be considered somewhat exploitative.[48] Working beyond their assigned budget may also be in the copy editor's best interests in order to help him or her secure jobs in future.

Freelance budgets vary according to the length and complexity of the manuscript and the work to be done. Holly may assign a $2,000 copy-editing budget for a typical 288-page book. Should a copy editor realize she's a quarter of the way through the book but has already eaten into half of the assigned budget, Holly recommends that the freelancer speak to her about why she may be running over. Should she give Holly a legitimate reason, such as if the references section requires a lot of work, the freelancer may be assigned a couple of hundred more dollars for the job to account for that unforeseen contingency.[49]

3.4 Adding it up: Average in-house salaries and benefits

As mentioned earlier, the primary rationale behind the use of freelancers at UBC Press is that this practice is roundly considered a more cost-effective option than hiring a

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[47] Keller, discussion, May 2005.
[48] Ibid.
[49] Ibid.

slew of staff members to perform the same tasks in house. Although the budget

production editors assign to different jobs varies from book to book, they tend to assign

similar budgets for the particular jobs (See Table 3). If the Press should choose to hire in-

house staff to complete these jobs, it would hypothetically be required to pay staffers the

industry's comparable going rates, plus benefits. Table 1 features the results of *Quill &*

Quire's 2005 workplace survey of Canadian publishing companies. The editorial

assistant would likely be required to perform duties such as proofreading. And the

average Art/Creative Director would probably be responsible for designing book covers

and performing typesetting duties.

Table 1:   Quill & Quire *workplace survey salary results*

Position	Average salary	>30 employees	<30 employees (such as UBC Press)
Copy Editor	$35,600	$36,100	$34,300
Editorial Assistant	$27,400	$28,000	$27,500
Art/Creative Director	$49,800	$59,000	$44,100

Data source: Scott MacDonald, "Workplace Survey 2005: This Year's Results Show Job Satisfaction on the Wane," Quill & Quire, July 2005, 16-17.

Adding to the average in-house salaries that Canadian publishing firms pay to

staffers are benefits. At UBC Press, staff members' benefits are dependent on their

employee group and hours of work. Of the Press's 19 staff members, 16 belong to the

Association of Administrative and Professional Staff (AAPS). The plan associated with

this group (for management and professional staff) provides Medical Services Plan

(MSP) coverage, extended health benefits, dental benefits, Employee and Family

Assistance Program (EFAP) coverage, basic life insurance, staff pension, vacation pay, and leaves of absence such as sick leave, stress leave, compassion leave, and maternity/paternity leave. The other three Press staff belong to the Canadian Union of Public Employees (CUPE) local 2950, and they qualify for roughly the same scope of coverage under slightly different terms.[50] These benefits are indicative of the responsibility the university shows towards its long-term employees.[51] Table 2 shows the annual benefits that a single in-house copy editor at UBC Press who belonged to the AAPS group would be entitled to receive.

Table 2:   *Annual benefits of single in-house copy editor belonging to the AAPS group*

Type of benefits	Amount per year
Medical Services Plan	$324
Extended health plan	$991.20
Dental	$1154.40
Employee and Family Assistance Program	$67.20
Life insurance	$90
Staff pension	$2875.68
Total	$5502.48

Data sources: The University of British Columbia, "What Benefits am I Eligible For?"
(accessed 15 November 2005). Life insurance is calculated as .265% of salary, based on Quill
& Quire's average copy editor salary of $34,300 at small firms of under 30 employees.

Another survey conducted by *Quill & Quire* and the Editors' Association of Canada (EAC) in 1999 determined a lack of benefits to be one of the "most troublesome aspects" of freelance editing.[52] Some respondents cited their ability to get coverage under a spouse's plan as significant factor in their decision to go freelance. And while the EAC

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[50] The University of British Columbia, "What Benefits am I Eligible For?"
http://www.hr.ubc.ca/benefits/eligibility.html (accessed 15 November 2005).
[51] Keller, discussion.
[52] Anita Lahey, "There's No Life Like It," *Quill & Quire,*
http://www.quillandquire.com/news/article.cfm?article_id=1390 (accessed 13 November 2005).

does offer members a small discount through an alliance with an insurance company,

benefits for freelance editors remains "a nagging problem yet to have a solution."[53]

3.5 Total spending on freelance jobs during the 2004-05 fiscal year

Table 3 features the average and total costs incurred by UBC Press for the freelance jobs

mentioned in the previous section. These costs represent total amounts spent on the 54

books published during the 2005 fiscal year.

Table 3:   *UBC Press freelance costs fiscal year ended 31 March 2005*

Service	Average cost per job	Total annual cost
Copy editing	$2,065.22	$107, 391.25
Proofreading	$697.41	$34, 173.13
Cover design	$853.82	$44,398.45
Typesetting	$1,667.27	$90,032.75
Text design	$475.31	$9,506.25
Indexing	$965.27	$15,444.25
Total	$6724.30	$300,946.08

Data source: UBC Press, "Page cost summary," 8/4/2005, 05.

Overall, the Press spent $300,946.08 on these freelance jobs over this period. This

amount is equal to about 15 percent of the Press's total expenses of $2,073,540 for this

same period.[54] The over $300,000 spent on these freelance jobs could have feasibly gone

towards hiring in-house staff members, should this option make financial sense.

For the $107,391.25 spent on copy editing, for example, the Press could have

hypothetically hired three in-house copy editors based on the average salary from the

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[53] Ibid.
[54] 2005 fiscal year-end numbers, 6 October 2005.

2005 *Quill & Quire* survey mentioned earlier. (See Table 1.) However, this potential

salary of $34,300 per would-be copy editor fails to include any benefits. Add to this the

average benefit package that a single in-house copy editor at the Press who belonged to

the AAPS group would receive, worth $5502.48 per year (see Table 2), and the cost of

hiring an in-house copy editor then rises to over $39,000 annually. But this figure does

not include the paid sick days that the majority of *Quill & Quire* survey respondents said

they receive.[55] It fails to include any costs for new hardware the Press would be forced to

incur as well. The hypothetical copy editor would surely require a computer on which to

work, which would only add to the Press's initial salary and benefit expenditures on this

pseudo-employee. And with the addition of a new computer would likely come the

eventual need for servicing and tech support by the Press's on-call technician.

The copy editor and their new computer would have to be housed in a workstation

somewhere within the current confines of the Press's production department, as crowded

as it already is. The hiring of an in-house copy editor, then, along with any other potential

staff to take over what were once freelance positions, would doubtlessly necessitate a

larger office space. More space, of course, would mean more outlay from the Press in

terms of rent money.

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[55] Scott MacDonald, "Workplace Survey 2005: This Year's Results Show Job Satisfaction on the Wane," *Quill & Quire*, July 2005, 16-17.

3.6 The bottom line: Does the Press's use of freelancers make financial sense?

UBC Press could have theoretically hired three in-house copy editors at an annual salary of $34,300 (see Table 1) for the $107,391.25 it spent on freelance copy editors last year (see Table 3). However, the press currently spends just over $2,000 on copy editing per book, which is scheduled to be four weeks' work. Therefore, if the Press were to book one freelance copy editor to work for 12 months straight, it would cost the Press only around $24,000 ($2,000 per book times 12 months). This amount is significantly lower than the $39,000 (minimum) that it would cost the Press to pay an in-house copy editor an annual salary (and benefits). In addition, the production department currently maintains a stable of some eight copy editors that it can choose to use as necessary. "With freelancers, you can have 10 people working for you one week and three people another week and you're not carrying a salary for them."[56]

If the Press were to hire staff to complete jobs such as copy editing and cover design in house, it would not only be faced with paying industry-standard salaries and benefits, but it may also incur other expenses such as hardware, tech support, rent, and sick pay. Conversely, other jobs such as indexing are typically not done in house because the monies spent on this task simply do not merit the hiring of a full-time employee to complete it. Not only do freelancers allow the Press to save money, however, the following section shows how they lend greater efficiency to the production process as a whole.

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[56] Milroy, discussion.

4. Lending efficiency to the production process and enhancing operations

Following finances, efficiency is the second most-cited reason for the use of freelancers at UBC Press. This section will examine how freelancers render the production process more efficient, determine what roles they play within it, find out how production editors prefer to book freelancers prior to using them and, lastly, look at how production editors specify expectations up front to ensure deliverables are met.

As mentioned earlier, each one of the Press's production editors is responsible for a list of tasks specific to them, as well as duties they share with others in the production department. All four production editors supervise "the flow of a manuscript ... . Starting with the submission of the manuscript, this editor tracks its progress through the various editorial functions."[57] They divide their time, daily, between a number of books at once – trying to shepherd them all through different stages of the production process at any given time. As Germano points out, "In a sense, what editors do, especially in an increasingly commercial environment, is portfolio management. An editor at a university press or a commercial academic house thinks about how much time a particular project, or author, is going to take."[58] Once a book is in production, production editors serve as interpreters to the author concerning printing schedules, and after the book has been sent

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[57] Greco, *Book Publishing Industry*, 125.
[58] Germano, *Getting It Published*, 78.

to print they serve as interpreters to the printer.[59] Ann, the editor, had the following to say about having to manage a variety of tasks at once: "I find even just in my regular job responsibilities you don't have that ideal state of being able to devote one day or maybe even two days to one book. You're getting emails from different authors, contributors, you have to kind of switch hats all the time, [asking yourself] 'where am I at with this one?'"[60] In-house editors who actually perform tasks such as copy editing in house need "focused time without administrative responsibilities, [with] peace and quiet" in which to devote their complete attention on the manuscript at hand.[61] The Press's production editors simply do not have the undisturbed time required to do tasks such as copy editing, which are handed off to freelancers.

In order to better manage their time, however, the production editors may either use the regular, fast, or collections/complex books schedules previously mentioned to determine which book requires their immediate attention, or refer to the title's transmittal form. Completed by the acquisitions editor prior to the transmittal meeting, this form contains a section specifying the title's priority by indicating its levels of "importance" and "complexity." In each case, books are generally ranked "high," "medium," or "low." A book of high importance, for example, may have good course-adoption potential or be authored by a well-recognized senior scholar in a particular field. However, the production editors may consider this same author difficult to communicate with, which would automatically render the production process more complex than usual. Conversely, a book of both low importance and complexity may be a standard scholarly monograph

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[59] Frances Halpenny, "The Editorial Function," in *The University as Publisher*, ed. Eleanor Harmon (Toronto: University of Toronto Press, 1961), 70.
[60] Ann Macklem (Editor), in discussion with the author, August 2005.
[61] Blakeley, discussion.

with few tables and figures that will appeal to a very limited audience. "Important" books may also have more at stake – they may need to be out in time for a conference, such as the annual Congress of the Humanities and Social Sciences, or be out in time for an academic author trying to get tenure.

Knowing both the importance and complexity levels of their books as they pass through the production process allows the production editors to prioritize them and assign them to freelancers, accordingly. The production department tends to rely on two typesetters, one of whom is very quick at turning around a manuscript and can generally have it back to the department within two weeks. The other, however, conducts equally skilled work but tends to take a longer time to complete similar jobs. If a manuscript is considered a high-priority book on a tight schedule, then, the production editor would likely choose to hand it off to the one who can do a reliable job of typesetting it quickly. Conversely, she may choose the other typesetter if she considers the book to be of lower priority that can afford to spend more time in typesetting.

The production editors also tend to use freelance project editors for complex low-priority books, despite wanting to be able to give every book an equal amount of editorial treatment. Although they generally prefer to hire separate freelancers to copy edit and proofread the same manuscript, the production editors will occasionally hire a project editor to perform both tasks. They are not as concerned, however, with a project editor doing copy editing and proofreading on the same book if that book is not considered high priority. These complex, low-priority books would simply take them "too much time in

house to get [their] heads around."[62] They can also budget less for proofreading as the copy editor already is familiar with the text.

4.1 Passing the book: How freelancers figure in the current production process

UBC Press's production editors make use of freelancers at every stage of the scholarly production process. At the transmittal meeting in which the acquisitions editors transmit the manuscript to the production department, the production editors discuss the desired look of the book (if a text design is required) and its cover – such things as number of colours, type of cover, and the use of images or a typographic style. The production editor then communicates this information to the book's chosen cover designer. Designers tend to be brought in early on because the cover image is needed for the seasonal catalogue that is completed in advance of the book going through production. One of the designers interviewed said they usually ask for a minimum of two weeks time in which to create two or three variations of the cover design, followed by a week for fine-tuning the chosen cover, and another week or two to produce a final proof with a back-cover layout, including copy. Assuming all this information is provided up front, they can complete a cover within four to five weeks.

As stated earlier, production will likely have started the in-house clean-up of the manuscript before the transmittal meeting. The purpose of the clean-up – compiling the manuscript according to house style and tagging elements such as tables and figures – is to essentially prepare the manuscript to be sent to the freelance copy editor. Camilla, the in-house project editor, said she will generally contact copy editors about three or four

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[62] Keller, discussion.

weeks in advance, when she has a sense of when the manuscript will be ready to move into that phase of production.[63] According to production's regular schedule, the copy editor then has about four weeks in which to do a stylistic and mechanical edit of the text, check the references, and ensure consistency throughout the notes and citations, for example, while performing onscreen copy editing.[64] "The more polished and well documented a manuscript the copy editor receives, the less time she has to waste on 'picking up the big pieces' – danglers, egregiously misused words, mutually contradictory text and tables, undocumented block quotes – and the more effort can be directed to fine tuning. Every text can benefit from the attention of a good editor."[65]

After the copy editor has returned the digital file of the manuscript to the Press, the production editor sends two paper copies to the author for review – one in which the copy editor's changes have been seamlessly integrated in the text (copy 1) and another showing every change the copy editor introduced, as well as the portions they struck out in the process (copy 2). Authors then have three weeks to review the manuscript and attempt to answer the copy editor's queries by handwriting their responses in the margins of copy 1. After the author returns copy 1 to the Press, the production editor either enters author comments in the digital file herself or has a summer intern or work-study student do this for her, which may take several hours or a couple of days. Production is also experimenting with sending selected authors the digital files to have them type their own

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[63] Blakeley, discussion.

[64] Freelance copy editor and proofreader, questionnaire response, 23 June 2005.

[65] Sylvia Hunter, "Why Copy Editors Matter," *Journal of Scholarly Publishing* 36,1 (2004): 11.

corrections in, in bold. This method is another cost and time saver for some books, but again, every book requires a slightly different strategy.[66]

The manuscript is then ready to be sent to a freelance typesetter. Currently, the press uses two freelance typesetters, one of whom tends to turn around the manuscript in two weeks or less, and another who may take up to three weeks to complete the same work. Typesetters are responsible for typesetting the manuscript, setting tables, preparing images for production, and preparing files for the Press's printer. Occasionally, they may also be contracted to do cover design, text design, preparatory specifications for figures, or to assess the quality of existing images.[67]

The typesetter then returns the first proof to the Press, where the production editor arranges to send copies to both a freelance proofreader and indexer, and another one to the author for review. The turnaround time for a proofreading job varies between two to four weeks, during which proofreaders are required to conduct a close read of the proofs in an attempt to flag typographical errors and any layout issues involving tables, maps, and figures. The Press's production editor may also have an intern or work-study student proofread the first proof in house at the same time. They will ultimately compare this copy of the proofs to the one returned from the proofreader, in case the student happened to spot any errors the proofreader may have missed.

The indexer receives a paper copy of the proof, as well as a PDF or Word version that can be used to locate occurrences of index terms they may have missed. Indexers usually use a program called Cindex to create the index, a process which varies in length according to the "length of the book, complexity of the material, how well the book is

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[66] Keller, discussion.

[67] Freelance typesetter, questionnaire response, 12 July 2005.

organized and written, and the number of illustrations used."[68] One indexer said they aim

for 10 pages an hour, but that this amount fluctuates.[69] According to the current regular

schedule, indexers have about three weeks to complete this task. They then return the

index in a Rich Text Format (RTF) Word document, which is forwarded to the author to

check.

Once the proofreader, indexer, and author return the first proofs to the Press, the

production editor collates their versions into one final version of the first proofs and

returns this to the typesetter to incorporate any changes and the index. The typesetter may

then spend about a week in using this information to create a second set of proofs. The

production editor will then review the second set of proofs in house, or assign this task to

a student. In order to ensure the recommended changes have been made, the student will

skim through both sets of proofs to compare them. Any necessary changes to the second

set of proofs are made on the digital file, which is then sent to the Press's printer within

the week.

Overall, it tends to take around eight months from the time a manuscript has been

transmitted for it to pass through the entire production process, which can vary in length

according to whether the book is on the fast, regular, or collections/complex schedule.

And certainly, there may be unforeseen hold ups at different points of the production

schedule that would serve to slow the process down and draw out this overall timeframe.

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[68] Freelance indexer, questionnaire response, 21 July 2005.
[69] Ibid.

4.2 Advance booking: The key to securing freelancers for future projects

One way in which UBC Press production editors ensure the book does not get caught up at any stage of the production process is to book freelancers in advance of when they are actually required.

Workflow meetings provide the production editors with an opportunity to sit down as a group and determine which freelancer they would like to work on a particular upcoming project. Ideally, the production editors would like to be able to conduct biweekly workflow meetings, but their busy schedules can better accommodate monthly meetings in which they update the department's production report as well. Before the cut-off date for the next season, however, the acquisitions editors tend to submit all their manuscripts to production at once to try to get them on the upcoming list. This results in what the production editors call "flipping" – their need to get a batch of manuscripts through the production process simultaneously, which entails less attention to details than they would like, causing them to miss problems or revisit issues later. Flipping manuscripts also forces the production editors to figure them out after they get them back from the copy editor and proofreader. The editors would rather have the control to figure out the manuscripts earlier on in the process, before transmittal meetings. Currently, 75 percent of manuscript clean-up jobs are done before transmittal, although Holly would prefer this number be closer to 100 percent.

If, however, the manuscripts come in gradually before the seasonal cut-off dates the production editors have more time in which to hold a workflow meeting and determine which freelancer may be good for what project. In this case, the production

editor is able to contact the freelancers in advance to determine whether they are able to take a job in the near future. Should the freelancer indicate she will be available, the production editor gets back to her closer to the date required. Of the three indexers surveyed, all said the Press's production editors usually contact them in advance to determine their availability for a project within a couple of weeks, or even a couple of months. A former freelance editor herself, Holly, the manager, feels very strongly about following up with the freelancers to ensure they get the promised job when expected because these jobs are a freelancer's livelihood.[70] Conversely, to the production editor, the freelancer represents a valuable resource that they are able to allocate to a certain project in advance.

4.3 Communicating Press specifications and expectations

Once the production editor has secured a freelancer for a particular job, she is then faced with having to communicate the specific requirements that such a job entails. Specifications and expectations are usually conveyed in a written memo that the editor sends the freelancers at the outset, along with the job. The purpose of the memo is to outline the production editor's primary concerns with the job and to inform the freelancer which areas may require their special attention. Conversely, the memo also asks that before starting the job, the freelancer inform the production editor of anything they notice to be out of the ordinary that could entail more work on the freelancer's behalf. If the editor receives this information from a freelancer up front, she is better able to adjust the job's budget to account for such unforeseen circumstances. Or the production editor may

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[70] Keller, discussion.

simply inform the freelancer that she does not intend for them to address the issue, or that it does not in fact need fixing at all.

The production editor also provides some, usually editorial, freelancers with job specifications in the form of style sheets. "The style sheet highlights problems that the author needs to address immediately," such as technical problems.[71] The production department maintains an evolving *UBC Press Style Sheet* addressing such issues as punctuation, spelling, and grammar. The current, 23-page iteration is provided to any new proofreaders or copy editors prior to commencing a job. Along with this overarching house style sheet, the production editor will send out checklists to the individual freelancers. There is also a specific style sheet for dealing with legal styles found in the Law and Society books. Proofreaders, for example, receive a "proofreading checklist" detailing what minutiae of text, layout, and tables and figures should merit their special attention. (See Appendix B). Indexers also receive an "index formatting checklist" specifying issues concerning general layout, individual entries, and alphabetization. Both checklists are intended to answer any questions that may arise for proofreaders and indexers over the course of their work for the Press.

Similarly, the production editor tries to give a freelance cover designer a thorough briefing about what she expects, prior to having them start a job. The transmittal meeting mentioned earlier is a key opportunity for the acquisitions editor and members of the marketing department to clearly inform the Press's editors just what their expectations are for a particular book, especially their cover ideas. The production editor then relays this information to the designer who ultimately presents a few mock-ups that will be critiqued

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[71] Greco, *Book Publishing Industry*, 171.

by members of editorial, marketing, and the Press's director. Even if expectations are conveyed beforehand, however, sometimes the production editor finds herself returning to the designer to ask them to resubmit their work because no one at the Press likes their original submissions. "Even at the level of the more academic title, cover and jacket design can be heated ground for disagreement as personal preferences – [the author's, editor's, the designer's] – come into play."[72] Designing a cover that pleases all concerned can be a difficult task, "Perhaps [the editor's] best balance between pleasing the author and pleasing the marketing and sales staff is to permit [the] designer to do what he or she is trained to do. Unless [the] press has consciously hired 'design staff' solely as technical facilitators, [the editor] may be shooting [herself] in the foot by not relying on their training and talent."[73]

The production editor attempts to avoid going back and forth with the designers by giving them a thorough briefing about their expectations for a book beforehand. "Presses can rely on their designers (both in-house and freelance) to produce a good design for each book if they are provided with enough helpful information from the sponsoring editor and the marketing director ... . Draw up some guidelines that can be used by editorial and marketing staff ... and then present the information to the design staff after agreement has been reached. Provide this information as early in the process as possible. Allow time for the creative process."[74] At UBC Press, this information comprises both production specifications – cover size, cover copy, type of cover (cloth or soft), flaps or not, and number of colours – and information about the book – a synopsis

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[72] Germano, *Getting It Published*, 179.
[73] Matt Williamson, as quoted in Bill Harnum, "Whose Cover Is It Anyway?" *Journal of Scholarly Publishing* 30, 3 (1999): 147.
[74] Harnum, "Whose Cover Is It?" 150.

or a chapter, table of contents, the intended audience, any author's preferences, and the desired approach (youthful, energetic, conservative, etc.).[75]

Naturally, the more information the production editor can provide the freelancer concerning the nature of a specific project before it begins, the more likely she is to have it completed according to her specifications.

4.4 Do freelancers really free up the Press's production time?

The busier the Press's production editors are in house, the more their time becomes a valuable commodity – one that they cannot afford to spare overseeing every aspect of the production process. The ability to secure freelancers for a project before the project actually begins provides the production editor with greater flexibility in the creation of her long-term schedule and thus more control in her effort to manage the workflow. Being able to clearly relate to freelancers the need to follow house style or the desired look and feel for a book ultimately means less work for the production editor further along in the production schedule. The Press's editors gain peace of mind knowing that the freelancer will complete the work as expected, and this frees up their time to focus their attentions on the countless other issues that doubtlessly arise over the course of a book's production.

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[75] Freelance designer, questionnaire response, 25 July 2005.

5. Adding value to the scholarly publishing process

Up until now, this report has examined ways in which UBC Press benefits from using freelancers in the scholarly publishing process. Not only do freelancers save the Press money and time, however, they also bring a number of separate skill sets and distinct talents to bear on their work. The following section will examine how the use of freelancers allows production editors to customize the work they commission on any given project, the reasons behind hiring legal editors, and in what circumstances the Press chooses to bypass the use of freelancers altogether. Lastly, it will look at how the Press benefits from the use of in-house project editors.

5.1 Providing job-customization opportunities

As Canada's leading social sciences publisher, UBC Press publishes 16 series, including the Canadian Democratic Audit, First Nations Languages, Asian Religions and Society, Studies in Canadian Military History, and the Sustainability and the Environment series. Such a broad, liberal-arts spectrum of series requires production editors to switch deftly from topic to topic while managing various manuscripts simultaneously. Although the Press's production editors each have their own preferences in terms of which books in which series they would rather take on, they tend to choose a book based on whether or not their schedule permits it. Conversely, the production editor will choose a freelance copy editor for a book based on the freelancer's demonstrated capability in working on a particular series. Three of the six copy editors interviewed for this report have been

freelancing for the Press for over 12 years, and the production editors are intimately familiar with their abilities to perform copy editing on a variety of subjects.

The Press's production editors generally prefer to match up manuscripts to the appropriate copy editor. They freely acknowledge that some freelance copy editors simply perform better work on technical or scientific texts, for example, while others tend to excel at editing manuscripts about social-critical theory. However, the only reason Holly, the manager, would not go with the freelancer best suited or most disposed to copy editing a manuscript in question was if that manuscript "was really well-written or [she] was really desperate."[76] Another exception to the norm would be when the production editor deems the copy editor to be too knowledgeable in the subject of the manuscript. Should the copy editor possess too much expertise in an area she may be more likely to go above and beyond what's expected of her by questioning the author's analysis of that subject. As mentioned earlier, however, by the time the copy editor receives the manuscript it has already undergone the academically rigourous peer-review process. Thus, the production editors do not expect copy editors to engage the author in a debate on the topic on which the author is surely an expert or who might object to editorial interference.

Sometimes, the production editors also present the copy editors with a choice of which manuscript they would like to work on. Although some of the copy editors surveyed said they would not decline a manuscript if was not of interest, most did specify which topics are of particular interest to them. Preferences run the gamut, with some freelancers preferring history and law titles, while others would rather work on those

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[76] Keller, discussion.

having to do with cultural criticism, First Nations' issues, or more philosophical topics. One copy editor admitted, "Most of the books I edit I would not read for pleasure, but I enjoy working on them all the same."[77]

When it comes to design, freelance designers provide the Press with more variety than would an in-house designer. Freelancers represent "new blood" to the production editors who take pride in their book-cover designs because their designers produce new designs all the time. Different designers have different looks, and the Press's books stand out on the shelf. Holly believes that in-house people may get "stale," and they would be difficult to fire, if necessary, due to their membership in one of the university's employee groups or unions. Thus, she cites dynamism as an added value from the use of freelancers.[78]

Overall, the Press's access to a talent pool of varied interests allows the production editors to be selective in their efforts to partner the appropriate copy editor to a particular manuscript. The production editors' ability to match freelancers with book topics lends additional value to the edited end product.

5.2 Using legal editors for the Law and Society series and *The Canadian Yearbook of International Law*

Currently standing at 24 titles, the Law and Society series is among one of UBC Press's most successful. Similarly, the Legal Dimensions series published in conjunction with the Law Commission of Canada includes another five titles. Together, these two series comprise the Press's "hard core" legal books, or primarily legal monographs. The Press also publishes many stand-alone legal titles, which do not fall under the banner of either

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[77] Freelance copy editor and proofreader, questionnaire response, 25 July 2005.
[78] Keller, discussion.

series and can be considered "hybrid books" containing "more than the usual number of cases and statutes cited."[79] Therefore, what most of these titles have in common is the need for freelance copy editors familiar with legal citation style.

Typical scholarly monographs, including legal books, may have hundreds of footnotes (or even thousands) and bibliographies of several pages, and a copy editor labours to harmonize a book's numerous references. "The heart of darkness for most copy editors is the notes section of a manuscript: here places of publication are absent, dates are strangely given as 19??, and the most important note number connects to a blank space and the words 'to come.'"[80] The legal citations found in a legal-related book simply add another layer of complexity to the already complex task of editing its notes section. Copy editors assigned to the hybrid legal books must be familiar with UBC Press house style concerning the citing of cases, legislation, and international agreements in both a book's notes and bibliography.

The Press's production editors therefore choose to use freelance copy editors with experience editing legal style. Frank Chow, a freelance editor with the Press since 1987, learned legal editing on the job by using Carswell's *Canadian Guide to Uniform Legal Citation*. He also authored the Press's style sheet for the Law and Society series to serve as a guide for other legal editors, at the Press's suggestion.

Another freelance editor of a different kind coordinates the publication of *The Canadian Yearbook of International Law*, a bilingual book issued annually in association with the Canadian Society of International Law and the Canadian Council on International Law. The Press uses a freelance project editor and former UBC Press

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[79] Freelance legal editor, questionnaire response, 1 August 2005.
[80] Germano, *Getting It Published*, 174-75.

employee, Stacy Belden, to oversee its publication. As project editor, Stacy ensures all chapters are submitted, coordinates the peer-review process, cleans up the manuscript, copy edits it herself, and contacts a French freelance copy editor, a proofreader, and an indexer, and deals directly with the book's editor – Don McRae. The *Yearbook* is the only book that the Press chooses to outsource completely and both McRae and Belden oversee its publication process from year to year using the same boilerplate template. Holly feels confident in handing the work off to them, and generally does not even see the *Yearbook* until it is actually published.[81] Once considered an oddity, the approach for this book has been adopted successfully for others such as the *Birds of British Columbia* volumes, and Lisa Matthewson's forthcoming *When I Was Small – I Wan Kwikws: A Grammatical Analysis of St'at'imcets Oral Narratives.*

Using experienced freelance editors familiar with legal citation style adds value to the Press's projects and ensures they meet the exacting standards required of legal texts. Likewise, using a freelance project editor to manage the production of the *Yearbook* frees up the production editors' in-house resources to concentrate on other projects. And it provides them with the peace of mind that comes from knowing experienced professionals will complete the *Yearbook* to their satisfaction.

5.3 Choosing to forgo the use of freelancers altogether: The in-house project editor

Although UBC Press uses freelance project editors for the Law and Society series, Camilla Blakeley is the Press's dedicated full-time, in-house project editor. Freelance project editors are called in to edit projects the Press's production editors are too busy to

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[81] Keller, discussion.

take on, but the Press often asks Camilla to work on projects "to impose UBC's own vision on the work."[82] As a project editor, Camilla will often edit and manage bigger, more complex books and special projects such as co-publications with the Royal Ontario Museum. These "packages of care," as Camilla calls them, tend to have high-level production requirements outside of the Press's usual parameters, such as a number of illustrations, maps, or the need for a heavy edit.[83] The *Birds of British Columbia* books mentioned earlier are the exception. Although Holly, the manager, does not actually serve as project editor on these big projects, she is heavily involved in coordinating their team of necessary freelancers including the typesetter, the cartographer, and the copy editor/proofreader.

But not all of Camilla's projects are full of illustrations and figures – some may have high-profile authors, such as Desmond Morton, or have high sales expectations and trade potential. She also performs the occasional developmental edit, as she did on the Press's highest profile title of the fall 2005 season, Stephen Clarkson's *The Big Red Machine*. When someone approaches the Press with an idea but he or she has not written a manuscript, Camilla may serve as their developmental editor by telling them what they "need to do to make it into a book."[84]

The author-editor relationship during these projects is enhanced by having a single person aware of a manuscript's various needs – as the sole contact for the project, Camilla is able to respond to any queries the author may have about it. The end result is a

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[82] Blakeley, discussion.
[83] Ibid.
[84] Ibid.

more unified, coherent book, in which "the vision is one, not in bits."[85] However, Camilla

only serves as project editor on about one such project a year and devotes the rest of her

time to working on other scholarly monographs and collections/complex books – as do

all the Press's production editors. Doing these projects in house provides the project

editor with a degree of job satisfaction that comes from managing the entire project

according to her specifications.

5.4 Does in-house project editing prove advantageous at the Press?

The production editors have debated whether taking on the special projects mentioned in

the previous section is a worthwhile use of the Press's time and money. On the one hand,

these special-project books certainly benefit from having a single editor keeping track of

their requirements – editing the text, scanning the illustrations, and checking permissions.

Darcy, the editor, said, "There are so many things going on at once, and the stakes are

high, and I think it works out for [Camilla] to be on top of it all."[86] The project editor also

tends to produce big, expensive-looking books that may serve to increase the Press's

profile in the trade and have won many awards and generated attention in the media. For

example, Camilla won the EAC's Tom Fairley Award for Editorial Excellence for her

work on *Couture and Commerce, The Transatlantic Fashion Trade in the 1950s* by

Alexandra Palmer.

During the 2004-2005 fiscal year, Camilla served as project editor on two

projects, the average budget of which was $1,870. This total amount is considerably less

than the average copy-editing budget of $2,065 for one title during the same time period

[85] Ibid.
[86] Cullen, discussion.

– as project editor, Camilla performs this duty herself and the cost of this job is rolled into the total project-editing budget. But because the books Camilla takes on as project editor are inherently more complicated than the standard scholarly monographs, they require more attention and a longer timeline for completion (as well as take time away from other books). As such, these books are capital intensive and thus more high risk than the standard monograph. Therefore, it has been suggested that the amount of in-house attention and resources lavished on such projects may be better spent on hiring freelancers to serve as their project editors or on choosing to focus on books with greater academic sales potential as opposed to those with limited trade sales potential. Sometimes sales on these projects do not pan out either, and the production editors are left to ask if they are worth all the extra effort. Although these projects provide the Press with a sense of in-house gratification, the Press has still not undertaken a quantitative evaluation of the financial benefit derived from doing these projects in house.

6. Sourcing out outsourcers: Finding freelancers that fit the Press's needs

This section will attempt to locate the trend of using freelancers within the greater context of the publishing industry. First, this section determines whether the trend exists within the Canadian publishing landscape in general, followed by an examination of the types of freelancers used at UBC Press and other Canadian university presses. Lastly, it contains an analysis of the Press's criteria used to select skilled freelancers, and it attempts to isolate the skills and talents of the individuals who make up this group.

6.1 Value-shifting: Moving from using in-house staff to outsourcing jobs

Using freelancers to perform any number of jobs in the publishing process is not a recent phenomenon. In the early 1990s, many trade and scholarly presses were forced to decrease their expenses. Instead of replacing departing editors with other full-time staff, publishers turned to freelancers to perform some of their functions and to minimize overhead costs.[87] During the mid-1990s, publishing companies continued to reassess the way they were operating in a competitive economic environment. Like those of other industries, publishing companies focused on downsizing and outsourcing yet they maintained a need for multi-skilled employees.[88] Today, publishers are increasingly outsourcing jobs such as copy editing and proofreading while continuing to employ

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[87] Greco, *Book Publishing Industry*, 170.
[88] Rosemary Shipton, "Value Added: Professional Editors and Publishers," *Journal of Scholarly Publishing* 27, 4 (1996): 222.

managing editors in house. This trend allows publishers to "more readily adapt to shifting

workloads than if they used only in-house editors, and the per-hour rate may be cheaper

than employing staff."[89]

UBC Press's current acquisitions editor and assistant director – editorial and

production services, Jean Wilson and Holly Keller, each started work for the Press as

freelancers. When Jean joined the Press as managing editor back in the late 1980s,

however, she did most of the copy editing work herself, only hiring the odd freelancer.

There were not as many books coming in at the time, and when Holly joined the Press in

1990 she too edited a few books in the office. Peter Milroy, the Press's current director,

also started in 1990, and he instituted onscreen copy editing at the Press shortly thereafter

in an effort to reduce typesetting costs. As the Press increased its output in the 90s, the

production editors began outsourcing jobs such as copy editing and proofreading that

they lacked the time to do themselves, in house.

6.2 Farming out jobs: traditional roles now assumed by freelancers at UBC Press

The production department at UBC Press now uses freelancers to complete required tasks

at various stages in the publication process. Most of the scholarly monographs and

collections/complex books that the department produces necessitate the hiring of a

freelance copy editor, a proofreader, a typesetter, a cover designer, possibly an indexer,

and on occasion a project editor for atypical projects. Other, similarly complex projects

may call for the use of an illustrator, a cartographer, or a translator. The Press's

marketing department also hires freelance market researchers to compile lists of

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[89] National Library of Australia, "Women Writing: Views and Prospects 1975-1995," National Library of Australia Online, http://www.nla.gov.au/events/weiss.html (accessed 23 September 2005).

academics who may be suitable candidates to receive copies of books with course-adoption potential.

Although the production department maintains a lengthy list of freelancers willing to conduct these jobs, it generally relies on about five proofreaders, eight copy editors, two typesetters, six designers, four indexers, and a couple of project editors. The marketing department makes use of a couple of undergraduate- and graduate-level university students to conduct its required market research.

6.3 Are Canadian university presses using freelancers for jobs traditionally done in house?

UBC Press is only one of many Canadian university presses that have chosen to outsource a number of traditionally in-house jobs to freelancers. The following sample shows how the use of freelancers at university presses varies from press to press. Editors at McGill-Queen's use roughly the same range of freelancers as those at UBC Press, primarily to be able to match manuscripts with the particular editorial specialties of their freelancers. Using outside designers also allows the editors a similar amount of flexibility and speed.[90] The University of Calgary Press has an in-house designer who does covers and provides page-layout templates. And although it uses freelancers for copy editing, proofreading, and typesetting, this Press's in-house staff tends to carry out these jobs as well.[91] Wilfrid Laurier University Press also counts designers and typesetters among its in-house staff, and its managing editor does much of the proofreading herself.[92]

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[90] Joan McGilvray, email message to author, 8 August 2005.
[91] John King, email message to author, 8 August 2005.
[92] Carroll Klein, email message to author, 8 August 2005.

Lastly, the University of Ottawa Press outsources virtually all of its production-related jobs, including project management like UBC Press. The director of the University of Ottawa Press, Ruth Bradley-St-Cyr, said that it simply does not have the staff to handle jobs such as proofreading and design in house. And that if the Press had a bigger budget with which to hire staff, she would hire first in marketing and administration and continue to use freelancers in editorial and production, regardless.[93] The use of freelancers at some Canadian academic presses, then, is largely a function of finances – should the press have the budget (and the inclination) to conduct jobs in house it will. Otherwise, as explained earlier, it may make more financial sense for the press to use freelancers.

6.4 The Press's selection criteria: Strengths, skills, and capabilities

Although UBC Press's production department receives around seven or eight resumés a week from people who are interested in doing freelance editorial work, the department maintains fairly high standards when it comes to actually hiring freelancers. Many of these would-be freelancers possess English degrees or may have conducted research for their professors, for example, but unless they actually have some experience editing at other presses, they likely will not hear back from UBC Press. Holly admits that although many of them would probably make good copy editors, a lack of time prevents her from being able to take a chance on them or to provide training.[94] Even if prospective employers possess the time to train them, editors are often (informally) expected to be "universal geniuses" who "walk on water" – innate qualities that surely cannot be

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[93] Ruth Bradley-St-Cyr, email message to author, 8 August 2005.
[94] Keller, discussion.

instilled through training.[95] Greco calls the search for an editor, "a quest for the Holy

Grail, a process that preoccupies far too many people and is doomed to disappoint almost

everyone."[96] Employers, in other words, may unrealistically expect potential editors to be

omniscient perfectionists.

That said, the Press's production editors do require prospective freelance editors

to possess a range of more objectively measurable qualities. Besides experience, the

production editors may judge would-be freelancers on whether they have taken any

editing courses. However, Holly favours freelancers who have actually had to apply *The

Chicago Manual of Style* in a work setting, for example, over those who have simply

studied the book in class.[97] At the least, a potential freelancer should know enough about

copy editing and proofreading to know that these are two different skills. Proofreaders are

expected to have a flawless eye, to be consistent, to regard the whole page as a jigsaw

puzzle with its own framework and structure, and to know what to mark or not. Copy

editors should have a firm grasp of editing documentation – an intimate working

knowledge of the scholarly monograph's apparatus comprising various styles of notes,

references, and bibliographies. Both project editors and cover designers are expected to

be able to work independently, and the latter should also have an independent vision for

the book's cover.[98]

All the Press's production editors seem to agree, the less work freelancers entail

from them, the better. Ideally, production staff would like to be able to provide a

freelancer with a style sheet and let them get to work – without having them call in with

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[95] Greco, *Book Publishing Industry*, 127.
[96] Ibid.
[97] Keller, discussion.
[98] Blakeley, discussion.

questions about the job at hand. Although Holly likes it when freelancers ask good questions, the production editors do not want to be pestered with inconsequential queries that they could feasibly answer themselves.

6.5 What education, experience, and enthusiasms do the Press's freelancers really possess?

As a whole, UBC Press freelancers possess a varied array of educational and work experiences. Yet some common threads emerge when examining the backgrounds of different kinds of freelancers.

Of the nine copy editors and proofreaders surveyed, almost none have had any formal training in either of these two fields – having instead acquired their skills on the job. Only a couple of have taken editing courses through the Canadian Centre for Studies in Publishing, Ryerson University, the EAC, or the Book Publishers' Professional Association. Over half of this group have Master's degrees in subjects such as English, biological sciences, anthropology, art history, and publishing. A few have PhDs in these areas as well, or are in the process of earning them. When it comes to job experience, however, many of the editorial freelancers have worked for Canadian universities in some capacity prior to joining the Press. Some taught university-level courses, for example, while others did either freelance or in-house work for other Canadian university presses. Over half of the nine editorial freelancers surveyed have worked for UBC Press for at least 10 years. And only two of them are currently members of the EAC.

All three of the indexers surveyed have either worked in libraries or have received graduate degrees in library and information studies. Two of them have taken indexing courses as part of their degrees, and the third indexer is self-taught. All three indexers are

also current members of the Indexing and Abstracting Society of Canada. One is also a member of both the EAC and the American Society of Indexers, as well.

Both of the designers surveyed have degrees in graphic design. One is a member of the Graphic Designers of Canada organization; the other a member of the American Institute of Graphic Arts. Neither of the two typesetters surveyed have any educational experience in this field – one is a trained architect, the other apprenticed as a compositor for the BC government's Queen's Printer. Although neither one of them belongs to any typesetting-related organization, both have been freelancing for the Press as typesetters for over 10 years and have been able to take on more titles during this growth period.

When asked the most challenging aspect of freelancing for a university press, many of the freelancers cited the need to familiarize themselves with a text's unfamiliar subject matter, which can occasionally present a steep learning curve. Similarly, many believe the most rewarding aspect of their work is the opportunity to contribute to a book while being able to learn something in the process.

Overall, UBC Press maintains a diverse stable of freelancers with an array of educational and work experience. Despite the fact that the majority of editorial freelancers lack formal training in copy editing and proofreading, they bring various liberal-arts and science backgrounds to the Press that its in-house editors can draw upon as needed. The indexers and designers are the freelancers with the most job-specific training – earned, for the most part, at the university level. Lastly, over the course of the last decade, both of the Press's typesetters have proven themselves as invaluable assets to the publishing process. Ultimately, while all the freelancers surely add value to this process, their varied backgrounds and levels of experience also add to the Press's ability

to customize the work done on any given project. According to Holly, another reason the

Press chooses to use freelancers is because "there is clearly a top-notch pool of educated,

talented, and motivated people willing to do the work [we want] ... this is why presses

use them. It works ... for them and us."[99]

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[99] Keller, discussion.

7. Recommendations and conclusion

While the previous sections analyzed UBC Press's various rationales for the use of freelancers in the scholarly publishing process, the production department's current concerns involving the use of copy and project editors remain unresolved. The following section features an update on these departmental concerns, considerations affecting potential decisions, and suggestions concerning their implementation.

7.1 Revisiting production's current concerns

The UBC Press's production editors had an opportunity to revisit some of their current concerns surrounding the use of freelancers at a departmental meeting held in early October, 2005. Once again, the issues of whether to expand the role of the copy editor and increase the use of freelance project editors were raised in the context of continuing to produce quality books. Any decisions made in response to these concerns, however, were now to be mitigated by the fact that the department had decided to hire a part-time production person. This new staff member would be responsible for a bulk of the department's purely production-related duties, including shopping around print specifications and Print-On-Demand (POD) jobs, handling reprints, dealing with the marketing department concerning catalogue issues, and liaising with typesetters and cover designers. With a new production staff member in house, the department's editors felt they would be better able to take on more titles in future while being less bogged down by some of the purely technical aspects of their jobs. It would also allow them to

spend more time dealing with the Press's authors, up front. However, questions concerning the department's use of freelance copy and project editors remained.

7.2 Recommendations based on current concerns

7.2.1. The copy editor's expanding role

Having been charged with inputting authors' comments from their marked-up hard copy manuscripts into the accompanying digital files, I can testify to the fact that this is can be a time-consuming task. One factor that greatly contributes to the length of time it takes to enter author comments is whether the author has chosen to add or remove any additional footnotes. Adding or removing footnotes to a manuscript does not generally cause a problem. But by the time the author receives the hard copy on which to write his or her comments, the manuscript may have already been stripped of any footnotes – meaning that the addition of new ones requires that all original footnotes be renumbered to reflect the additions.[100] Doing so creates a lot more work for the person left to incorporate author comments, who must renumber both superscript footnotes in the text and those in the designated notes section by hand. Having distanced herself from the manuscript during the copy-editing process, the in-house production editor who enters author comments is once again forced to submerge herself in its minutiae. But she would be required to do so regardless, should any interns or work-study students be unavailable for the job.

The copy editor is in a better position to smoothly incorporate the author comments into the copy-edited version of the manuscript. Because it was she who posed the initial queries to which the author responded, the copy editor is likely more apt to

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[100] Production editors or interns use a program called NoteStripper to remove the text of embedded footnotes from the body of the manuscripts and relocate them at the end of the manuscript (in the case of a monograph) or at the end of the chapter (in the case of a collection).

understand the context of the author's responses. Having the copy editor enter author comments would free up interns' or production editors' time, which may be better spent on a variety of other equally, if not more, pressing tasks – such as becoming more familiar with the book's issues earlier rather than at pre-typesetting stage. Similarly, having more authors enter their own comments in the digital files would also allow the editors to focus their attention on other essential duties.

7.2.2. Increased use of freelance project editors

Although management at UBC Press had decided to hire a new staff member to help ease the production department workload, the production editors decided they may attempt to use more freelance project editors in future, depending on the nature of the project at hand. Again, there would be no one answer to the project-editor question simply because each book is different. Any uniform decision imposed in an attempt to solve this dilemma would cause quality to suffer. Should the Press decide to use more freelance project editors when appropriate, however, the question remained as to what books these freelancers would take on. Although the production editors had previously discussed using additional project editors for scholarly monographs, the suggestion was raised to start using them for the more complex and labour-intensive edited collections/complex books. Freelance project editors taking on these books would then be responsible for assessing their illustrations as well – a job that would ultimately have to be vetted by a current production staffer (and would also require more training for the freelancer).

The production department could consider implementing any decision to hand off more manuscripts to freelance project editors in two ways. Firstly, the production editors may consider using experienced freelance project editors to handle some

collections/complex books. Currently, production uses two freelance project editors who have previously performed this function, with much success, on monographs. These experienced project editors would likely be more capable of managing collections/complex books than other freelance project editors yet to take on monographs. New or inexperienced project editors could then be assigned to these more straightforward manuscripts, which generally do not involve as many dealings with the authors or potential illustrations. Because production's current freelance project editors cut their teeth as copy editors, it would seem natural to offer any upcoming project-editing jobs (on monographs) to some of the Press's current freelance copy editors as well. Using current copy editors as project editors, however, would likely necessitate the hiring of more freelance copy editors, in future.

One remaining concern pertaining to both the expanded role of the freelance copy editor and the increased use of project editors was budgets. New budgets would have to be allocated to these jobs based on the amount of new duties involved with each. During the production department's October meeting, it was suggested that copy editors charged with entering author comments be paid $500-$1,000 more for this extended role, which would up the cost of this job to between $2,500 and $3,000. Determining the budget for freelance project editors, however, raises another issue surrounding their use – whether project editors are capable of proofreading their manuscripts on top of their other duties; and if so, would the cost of proofreading be rolled into that of copy editing. The production editors tended to agree these are two separate tasks requiring two separate skill sets best left to those most proficient at completing either. They then discussed making proofreading mandatory only for those books that have undergone a more intense

copy edit or contain more author revisions – and that some may be able to do without proofreading altogether. Whether a project editor could be trusted to proofread his manuscript or a freelancer will be brought in to perform this same job is something the production editors will likely choose to decide on a project-by-project basis, in future. And a book's budget would then be determined at the time to reflect this decision either way.

The fact that the Press currently chooses to use freelance proofreaders for the majority of its books, however, is a mark of pride for the production editors. Proofreading is seen as part of the quality of service that UBC Press is able to offer its authors – quality that is ultimately reflected in the Press's books. Again, the dilemma, as seen by the production editors, is to retain "high enough" standards while being able to increase efficiency as well.

7.3 Freelancers facilitate every step of the production process, adding value in the process

From the time a scholarly manuscript has been received until it appears in book form from the printers, freelancers now play integral roles in every stage of the scholarly publication process at UBC Press. The use of freelancers allows production editors to buy their time as needed in order to complete jobs that would cost the Press comparatively more to do in house. Perhaps more importantly from a financial perspective, however, are the cost savings associated with using freelancers – they automatically eliminate the Press's need to pay salaries, benefits, and other related overhead expenses. Unlike the production editors, editorial freelancers, for example, are simply more capable of spending the necessarily long periods of undisturbed time in completing their work.

Similarly, the production editors' ability to book freelancers' time in advance and to communicate their expectations up front guarantees freelance jobs will be completed to the Press's specifications and deadlines. Lastly, maintaining a pool of freelancers each with their own strengths, capabilities, and interests allows the Press's production department to mix and match jobs with the appropriate members of this group.

Freelancers have contributed to UBC Press's reputation for producing quality scholarly books. Although questions remain concerning the Press's use of copy editors, project editors, and the budgets associated with these two jobs, the Press will surely continue to benefit financially, increase its efficiency while maintaining quality, and add more value to its books from having integrated freelancers in every aspect of the scholarly production process. As such, freelancers play a vital role in Canadian scholarly publishing – one that will only serve to better this unique proposition as a whole, in future.

Appendices

Appendix A: Regular schedule

REGULAR SCHEDULE (November 2005)		
Author/Editor:		
Title:		
Series:		
Complexity:		
Priority:		
Need for:		
TEXT SCHEDULE	**Projected:**	**Actual:**
Manuscript from acquisitions editor:	1-Jan-05	
Manuscript to copy-editor:	21-Jan-05	
Manuscript from copy-editor:	20-Feb-05	
Manuscript to author:	4-Mar-05	
Manuscript from author:	3-Apr-05	
Manuscript to typesetter:	17-Apr-05	
1st proof from typesetter:	8-May-05	
1st proof to auth/proof/index:	15-May-05	
1st proof from auth/proof/index:	14-Jun-05	
1st proof to typesetter:	28-Jun-05	
2nd proof from typesetter:	8-Jul-05	
Digital files to printer	15-Jul-05	
Finished books in:	2-Sep-05	

Cover designer:

Copy editor:

Typesetter:

Proofreader:

Indexer:

Author absences and other notes:

Appendix B: Proofreading checklist

TEXT	DONE
Pages number consecutively and all pages are included.	
Chapter and part titles in table of contents are the same as on chapter and part openers and notes section.	
Page numbers on table of contents and on list of maps, figures, tables correct. If there aren't any page numbers yet, add them.	
Map, figure, table titles on prelim list the same as on the maps, figures, and tables themselves, or if abbreviated, then understandable.	
Levels of headings correct.	
Running heads for endnotes section list correct page numbers. Fill them in if necessary.	
Running heads correct throughout. (If main title + subtitle, main on verso, subtitle on recto.)	
No bad hyphen breaks or hyphens at bottom of recto.	
Endnote numbers run consecutively and match the list at chapter or book end.	
Single quotation marks inside double.	
Introductory punctuation of block quotes and lists correct. Punctuate the text that introduces a quote or a list as if the quote or list completes the sentence (i.e., use a colon or a comma or no punctuation, depending on the sentence).	
Format of lists matches house style.	
All tables, maps, and figures have been inserted into the text in the correct order and location and nothing is missing.	
No more than 2 stacked hyphens or words.	
VISUAL	
Watch for excessively loose or tight lines.	
Spacing above and below block quotes and tables.	
Ellipses properly spaced.	
Spreads align at top and bottom and generally look appropriate (nothing too clashing on a single spread).	
No running heads on landscaped pages .	
Formatting of chapter openers.	
Part openers on recto.	
Check for widows and orphans.	
TABLES	
Digits align from decimal point or flush right if there are no decimals.	
Columns of numbers add up if appropriate.	
Headings and subheadings are sentence style (only first word and proper nouns capitalized).	
Column heads follow consistent format (e.g., flush right or centred).	
Runovers indent 1 em.	

Appendix C: Interview questions for UBC Press production editors

1. Why does UBC Press choose to outsource certain jobs – proofreading, copy editing, indexing, cover design, etc.?

2. What types of freelancers does UBC Press use?

3. When did the production department begin using freelancers?

4. What kind of interaction/dealings do you have with freelancers?

5. How many freelancers does the production department use on a regular basis?

6. How does UBC Press go about enlisting freelancers or finding suitable freelancers?

7. On what criteria are potential freelancers judged? What kind of skills must they possess? Are freelance copy editors/proofreaders, for example, required to take a test?

8. What work are the different types of freelancers hired on to do? What is expected of proofreaders, copy editors, typesetters, indexers, book designers (layout), cover designers, and those doing market research?

9. At what stage in the publication of the book is each type of freelancer enlisted? How long does each type generally have to complete the work required of them?

10. With editorial freelancers, must they have a background in the subject matter of the books they are working on? Or does it help if they do?

11. What makes a good freelancer proofreader, copy editor, typesetter, etc.?

12. What factors determine whether a freelancer will be hired on again in future?

13. Does UBC Press tend to use the same group of freelancers repeatedly?

14. Does UBC Press have different contracts for different freelancers, or one standard agreement?

15. Are freelancers able to negotiate their rates of pay with UBC Press?

16. Does UBC Press pay more based on past experience?

17. How has the Press's increased title output affected the roles of freelancers? Do they have to turn around work more quickly than in the past?

18. How do you think using freelancers saves the production department time, which is then used to focus on other things? How does the Press benefit, time-wise, from using freelancers?

19. What do you focus most of your time on getting done, which would be difficult without the use of freelancers? (What are your priorities?)

20. What strategies do you employ to determine what kind of in-depth work you are going to do on a project (within budget)?

21. What considerations do you keep in mind when assigning a budget for each book?

22. How are authors responsible for a book's artwork?

23. How is deciding the budget for a book cover a group decision?

24. What is discussed at/decided on at the production department's workflow meetings?

25. Does each production editor work on a certain type of book – for example, is one editor in charge of the Law and Society series in general?

26. What exactly happens at transmittal meetings?

27. How do you benefit from having a book go through transmittal before it is given to the copy editor?

28. How do you set expectations for a book at the transmittal stage? How do you make them clear?

29. What information from the transmittal gets passed along to the copy editor and cover designer, for example?

30. What does tagging a manuscript involve?

31. Do you know how much editing peer reviewers generally do on a manuscript? Do they undertake much substantive editing?

32. How do the production editors assign a priority level to books based on their complexity?

33. Why does the Press prefer copy editors to do onscreen editing?

34. What do you think about copy editors entering the author comments?

35. Ideally, what time periods would you like to see for the three different schedules used by the production department?

36. What special circumstances would warrant the hiring of a freelance project editor? What kind of book would merit this decision?

37. What does being a project editor entail and why would you choose to do this job?

38. Do you ever employ translators and illustrators? If so, when and why?

39. Do you ever choose to forgo hiring a copy editor or proofreader in order to do these jobs yourself? Under what circumstances?

40. What kinds of books do you personally prefer to take on?

Appendix D: Questionnaire for UBC Press freelancers

1. When did you start freelancing for UBC Press?
2. How did you decide to begin freelancing for the Press? What if anything, drew you to it?
3. What is your educational/work background? Have you had any formal training?
4. Had you done other freelance work before you started freelancing for the Press?
5. How often do you do freelance jobs for the Press, currently?
6. What kind of freelance job do you typically do for the Press? What duties does it involve?
7. How does freelancing for a scholarly press differ from the work you may do for other publishers or clients? What is the biggest difference?
8. Do you maintain much communication with the Press's production editors once you have started a job for them? What type of communication – email, phone, etc?
9. What determines the amount you invoice the Press for the work completed? Are you generally aware of how much you will be invoicing before starting a job?
10. Do you have a preference to work on books of a certain topic, for example, the Law and Society series? Or books that are of a personal interest?
11. Does someone at the Press contact you when they are looking for a freelancer, or do you check in periodically to see if there is work to be done?
12. Why do you continue freelancing for UBC Press?
13. What is the most challenging aspect of freelancing for the Press? And the most rewarding?
14. Are you a member of any professional organizations?
15. Do I have your permission to use your answers in my report?

Appendix E: Questionnaire for Canadian university press editors

1. What jobs does (your) Press use freelancers for? (For example, proofreading, indexing, design, cartography, etc.)

2. Why does (your press) choose to outsource these jobs?

3. Do I have your permission to use your answers in my report?

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