

# CHAPTER 1

## Introduction, contextualisation and problem statement

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### 1.1 INTRODUCTION

Within the field of language practice<sup>1</sup> the role of the editor<sup>2</sup> remains contentious, with varied definitions and demarcations of editorial skills, tasks, and responsibilities. This may, in part, be attributed to the fact that relatively little theoretical reflection on the practice of editing is available, particularly compared to the wide-ranging theoretical developments associated with other fields of language practice, such as translation, subtitling and interpreting. While many people have tried to define exactly what an editor does, and to describe the qualities that an editor should have, a clear and generally accepted definition remains elusive. In an article entitled “What is an editor?” Williams (1993:4) makes the following opening statement:

An editor is so many things to so many people that this rhetorically questioning heading is virtually impossible to answer in any concise form. In addition, any one editor is likely to be cut from such radically different cloth from the next one that generalizing about character, somatotype, background, interests, or whatever would be as meaningless as grouping them by eye color. If form eludes us, then, function should be where we look for unifying aspects.

While using the functions that editors perform as a starting point for defining the term “editor” seems like a logical first step, a further problem is the fact that editors perform significantly different functions in different contexts. Nevertheless, the point that Williams makes is important, and an investigation of the tasks and skills<sup>3</sup> associated with editorial work in the various industry sectors should certainly form the basis of any attempt to define the work of the editor. This kind

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<sup>1</sup> The term “language practice” is used in this study to refer to the fields of translation, interpreting, subtitling and editing.

<sup>2</sup> The term “editor” (and its related parts of speech) is used in this study to refer to all text-editors/copyeditors/proofreaders/editors, from all sectors of the editing industry, who work to improve a text in its entirety. This is based on the assertion by Du Plessis and Carstens (2000:61) that “[t]aalversorging as *proses* moet nie net beskou word as die korrigering van taal nie, maar ook as die versorging van die teks as geheel, met ander woorde die totale *produkt* en nie net 'n deel (taalgebruik) daarvan nie”.

<sup>3</sup> The term “tasks” is used in this study to refer to all jobs and responsibilities that fall to an editor, while the term “skills” is used in this study to refer to skills, knowledge and abilities associated with the role and editorial work of editors.

of definition and demarcation is particularly important against the background of the lack of professional status for editors in South Africa.

The numerous misperceptions surrounding the role of the editor fuels the many challenges that South African editors are confronted with, some of which include: working in a highly unregulated field; having to compete with less competent “editors” who charge less for their services; constantly having to justify the importance of their work and the fact that editing is essential for any published text; and dealing with a lack of professional status. As a solution to these (and other) problems, the South African editing industry needs to develop standards for practice. The development of such a set of standards would contribute directly to the professionalisation of the industry by establishing a point from which the editor’s role, function and responsibilities can be determined. In addition, the development of standards will contribute towards standardising the training of editors, improving the professional status of the industry, and generally regulating the industry.

This study investigates the need to standardise the South African editing industry, as well as the impact that the development of standards will have on the industry. In particular, the study aims to clarify the role of the editor by developing core standards that reflect the skills and abilities required of all editors in South Africa, regardless of the industry sector in which they work. In this chapter, the conceptualisation and problem statement for the investigation are outlined in Section 1.2. In Section 1.3 the central theoretical statement guiding the research is formulated, while Section 1.4 outlines the research objectives. Section 1.5 discusses the research methodology for the study, and Section 1.6 provides an outline of the chapters in the study.

## **1.2 BACKGROUND, CONCEPTUALISATION AND PROBLEM STATEMENT**

Over the last decade, various role-players in the South African editing industry, including researchers, editors, publishers and professional organisations, have started placing increasing emphasis on the professionalisation of the industry. This is reflected in recent research focusing either primarily or partially on the promotion of the professional status of editors, the development and standardisation of editor training at tertiary institutions, and the delineation of the tasks and skills of editors. Some of this research includes work by Kotze (1997), Kruger *et al.*, (1998), Du Plessis and Carstens (2000), Blaauw (2001), Kruger (2007, 2008), and Law and Kruger (2008). While much of the recent research focus has been on issues such as professionalisation, accreditation, training and ethical regulation, no research has yet been conducted regarding the development of a set of professional editing standards that may play an integral part in the professionalisation and regulation of the South African editing industry, its practices and the training of editors.

In recent years, some practical steps have also been taken to promote the professionalisation of the editing industry in South Africa. A South African Language Practitioners' Council (SALPC) Bill was drafted in 2000. The aim of the Bill is to “establish the Language Practitioners' Council of South Africa; to provide for control over the training, accreditation, and registration of language practitioners; and to provide for matters incidental thereto” (DAC, 2000:1). The bill forms part of the National Language Policy Framework (NLPF). According to Boers (2007), the bill was supposed to be submitted to the Department of Arts and Culture (DAC) to serve before the National Assembly between late 2006 and early 2007. At the time of writing, no information regarding the status of this bill is available.

In 2005, the Standards Generating Body (SGB) for Translation, Interpreting and Language Editing (TILE) of the South African Qualifications Authority (SAQA) issued a National Qualification Framework (NQF) level 8 qualification and unit standards for public comment (SAQA, 2005:26). This qualification is defined as a national certificate or diploma in text editing and document design, and includes seven unit standards. According to SAQA (2005:34-40) these unit standards are:

- analyse text for editing purposes
- design documents
- edit language usage in text
- edit text format and layout
- edit text structure
- manage editing process, and
- proofread text for production.

Despite these steps, South African editors currently do not have a prescribed set of professional editing standards. The lack of such a set of standards is cause for concern because it suggests that the South African editing industry is not a professional and regulated industry, as also reiterated by Du Plessis and Carstens (2000:62). This lack of regulation and control may have potentially significant detrimental consequences, particularly considering the key communicative role of editors in an age in which the dissemination of information is becoming ever more globalised and technologised (Kruger, 2007:2). One important problem arising from a lack of regulation and the absence of generally accepted standards for editing is that there is no point from which to measure editing competence, which also impacts the training of editors in tertiary institutions or elsewhere, making it difficult to standardise training. Furthermore, the absence of editing standards also means that there is no way in which the industry and its practices can be regulated. The importance of the role of editors and the need to regulate the editing industry are highlighted in the following statement by SAQA (2005:26):

Qualified, competent text editors ... will ensure that South African published text is of suitable quality, and will contribute to transforming South Africa's reading culture. In addition, quality text contributes to the development of a multi-lingual society, especially in terms of languages that are in the process of further development and transformation for academic, economic, scientific and other purposes.

Kruger *et al.* (1998:viii) warn against the use of unqualified or incompetent language practitioners: "There is a widespread perception among users of language services that language practice is a profession that can be practised at will by persons of varying (or no) qualifications, varying levels of proficiency and some horrifying notions of ethical behaviour. The results are a lack of professional status for language workers." In response to this statement, Blaauw (2001:12) asserts that the industry needs to be regulated as a step towards professionalisation.

The one organisation that has been the main role player in the regulation of the South African editing industry is the South African Translators' Institute (SATI). Over the last decade, SATI has played a vital role in the promotion of the professional status of language workers in South Africa. While SATI, currently, represents all language professions in South Africa, its main focus lies within the fields of interpreting and translation, and to a lesser degree editing – a focus evident in the name of the organisation. This focus is possibly also reflected in the fact that SATI's accreditation examination for editors covers only aspects of language editing. According to Law and Kruger (2008:481), SATI's accreditation for editors does not cover other aspects of editing, "for example, large-scale content editing or structural editing, or other dimensions of the editor's work, such as client liaison and project management". In terms of regulation, SATI has established a code of ethics to which all of its members subscribe. While this type of regulation is certainly necessary, it is an ethical rather than a practical or legal type of regulation.<sup>4</sup> In addition, no specific editing standards have been formulated or made available to guide this regulation.

More recently, the Professional Editors' Group (PEG) – an informal association for South African editors – has started placing increasing emphasis on the regulation of its members. In particular, PEG administers SATI's accreditation examination to its members and has recently (in 2009) appointed a Continuing Professional Development (CPD) committee that ranks members and classifies their level of professional development based on certain requirements. This indicates that PEG is playing an ever more important role in the regulation and standardisation of the South African editing industry.

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<sup>4</sup> For more information on SATI, see [www.translators.org.za](http://www.translators.org.za).

The invaluable role that regulation plays within an industry is well documented (see Halmos, 1973; Larson, 1979; Langenhoven & Daniels, 1980; Carmichael & Pomerleano, 2002; Frost, 2007; Wadensjö *et al.*, 2007). Various professional industries in South Africa (and globally) have ensured the raised professional status, standardised training and accreditation of their members through the active and continuous regulation of their industry. For example, in order for someone to qualify as an auditor in South Africa, he/she needs to fulfil a number of requirements as prescribed by the South African Institute of Chartered Accountants (SAICA). These requirements include completing a BCom honours degree or Certificate in the Theory of Accounting (CTA), three years of articles clerkship at an approved or registered training organisation, and the successful completion of two qualification examinations (SAICA, 2008). These requirements have all been standardised, and all people wishing to become qualified auditors have to comply with these requirements before being allowed to practise.<sup>5</sup> The standardisation of the South African auditing industry suggests that an industry may be best managed if standards for training and practice are set, and consistently regulated.

An investigation of the editing industries in Canada, Australia and Britain offers good examples of the progress made towards the development of a set of professional editing standards. The Editors' Association of Canada (EAC), the Institute for Professional Editors' in Australia (IPEd) and the Publishing Training Centre (PTC) in Britain have all established a set of editing standards that are recognised within their respective industries. While none of these organisations has been able to incorporate regulatory bodies into their country's legislation, they have been successful at establishing some form of nationally recognised regulation, standardisation and accreditation.<sup>6</sup>

However, these standards and related processes and structures are context-specific, reflecting the needs of particular environments, and it would therefore, in all likelihood, not be possible to simply replicate these for South Africa. The South African editing industry is unique. The fact that there are eleven official languages in South Africa creates a number of challenges for the development of a set of professional editing standards. Law and Kruger (2008:490) highlight this problem: "An aspect that will require meticulous care and attention [when developing editing standards] is how to accommodate the multilingual nature of the South African context in a set of standards."

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<sup>5</sup> For more information regarding the standardisation of the accounting industry see SAICA's website at [www.saica.co.za](http://www.saica.co.za).

<sup>6</sup> For more information on the editing standards in Canada, Australia and Britain see [www.iped-editors.org](http://www.iped-editors.org) for Australia, [www.editors.ca](http://www.editors.ca) for Canada, and [www.train4publishing.co.uk](http://www.train4publishing.co.uk) for Britain.

As pointed out in the introduction to this chapter, another issue that needs to be addressed is the tasks and skills associated with the various sectors in which editors may work. This is important, as editors from various sectors do not necessarily perform the same tasks and may not subscribe to the same editorial practices. For example, editors working in the book-publishing industry are required to perform tasks that may vary from the tasks required of editors working at a magazine or a newspaper. Law and Kruger (2008:490) take cognisance of this by stating that before standards for editing can be produced one needs to be able to provide accurate and comprehensive definitions of what all the different types of editing as practised in different contexts entail. Therefore, the development of a set of standards would need to be founded on a comprehensive list of editorial tasks that could possibly apply to all sectors of the industry. More specific tasks and skills, linked to certain sectors, could then be identified and added to the set of standards.

In view of the above, Law and Kruger (2008:490) have postulated that one way of going about the development of standards would be to create a set of basic or core tasks and skills on which to base key standards. This set of core tasks and skills will be applicable to editorial work in all sectors of the South African editing industry, and will therefore reflect the central tasks and skills associated with the different types of editing as practised in the various sectors of the industry. Such a set of core standards could therefore underpin the development of a complete set of standards, to which additional tasks linked to particular sectors of the industry could be added.

The above overview gives rise to the following research question: Which editing tasks and skills should be included in a set of core editing standards that reflects the work of all South African editors?

### **1.3 CENTRAL THEORETICAL STATEMENT**

This study postulates that it is possible to develop a set of core standards for the South African editing industry which is acceptable to the various sectors of the industry. Such a set of core standards is indicative of the belief of various role-players in the industry that standardisation is necessary.

## **1.4 RESEARCH OBJECTIVES**

The primary objective of this research study is to develop a set of core standards for the South African editing industry.

In order to achieve the primary objective, the following sub-objectives are formulated:

1. Analyse the status of the South African editing industry with a view to determining the benefits of standardisation.
2. Determine which tasks and skills are associated with the various sectors of the editing industry through a literature review.
3. Investigate the acceptability of these tasks and skills for South African editors through an empirical study.
4. Identify which tasks and skills are common to editors from all sectors of the editing industry and develop a set of core standards for the South African editing industry based on these.

## **1.5 METHODOLOGY**

In order to achieve the objectives outlined above, the study comprised a literature review and an empirical study.

### **1.5.1 Literature review**

A literature review of the relevant sources dealing specifically with the standardisation of the editing industry in South Africa and internationally was conducted. The aim of this initial analysis was twofold. It firstly aimed to contextualise all issues pertaining to the professional regulation and standardisation of the South African editing industry by paying particular attention to:

- the status of the South African editing industry,
- the need to standardise the South African editing industry,
- the processes involved in and the purposes of the development of standards,
- the progress made towards the regulation of the editing industry in other countries, and
- examples of regulation and standardisation in other fields of language practice that may be useful for the purposes of this study.

The second aim of the literature review was to lay the groundwork for the empirical part of the study. To fulfil this aim, attention was given to the following:

- the classification of the various sectors of the South African editing industry, and
- the identification of tasks and skills associated with each of the sectors identified for the purposes of this study.

This culminated in a comprehensive delineation of the tasks and skills associated with the work of editors from the various sectors of the editing industry, in order to arrive at an all-inclusive list of tasks and skills that was used for the empirical portion of the research. For this part of the literature survey, emphasis was placed on key theoretical and practical texts on editing.

### **1.5.2 Empirical study**

The empirical part of this study is of key importance, as it contributes directly to the development of a set of core editing standards. The empirical portion of the study comprised two main phases: a quantitative survey in the form of a questionnaire and a qualitative semi-Delphi study.

#### **1.5.2.1 Phase one: quantitative survey**

The first phase of the empirical study consisted of a quantitative survey in the form of a questionnaire that was emailed to a sample of editors. The aim of the survey was to determine which tasks and skills form part of the daily working life of editors from all sectors of the industry. The quantitative approach was selected for this part of the study as this type of approach is “based on the collection of considerable data from representative samples of a larger population for a few variables” (Black, 1999:9).

The target population for this study was defined as all text editors working within the various sectors of the South African editing industry. For the purposes of this study, these sectors were defined as editing for book publishing, mass-media editing, technical editing and academic editing. The sample of editors for the study therefore needed to represent editors from these four sectors of the South African editing industry. Five strata representing the four sectors were used to draw the sample of respondents:

- the directory of members of the Publishers’ Association of South Africa (PASA) (2009) to sample editors working in the book-publishing sector,

- the Average Issue Readership of Newspapers and Magazines (SAARF, 2008), to sample editors working in the mass-media sector, and
- the mailing lists of the South African Translators' Institute (SATI), the Professional Editors' Group (PEG) and an established language-services agency to sample editors working in the academic- and technical-editing sectors.

The simple random sampling technique was used to draw the sample from the book-publishing and mass-media sectors, while a self-selection sampling technique was utilised to determine the sample for the academic- and technical-editing sectors.

The questionnaire comprised three sections and a covering letter (including a statement of confidentiality): the first section asked respondents to indicate their biographical details (industry sector, primary working language, number of years editing experience, accreditation status and working context). The second section of the questionnaire listed a number of textual editing tasks that are relevant to the various levels or types of editing, as determined by the literature survey. The respondents were asked to indicate how often they perform a particular task in their everyday work. A four-point Likert scale with options ranging from "Very often" to "Almost never" was supplied for the respondents to select their answer options. The third section of the questionnaire listed a number of extra-textual skills that are relevant to editorial work, again derived from the list of tasks and skills yielded by the literature survey. The respondents were asked to indicate how important each skill is for their work. A four-point Likert scale with options ranging from "Very important" to "Unimportant" was supplied. Prior to the distribution of the questionnaire to the main sample, the questionnaire was tested for validity utilising the pre-test method, which took place in three stages. The questionnaire was first scrutinised by three experienced researchers in order to ensure the face and content validity of the instrument. Thereafter, the questionnaire was sent to four practising editors in order to determine the content validity of the instrument, and also to ensure that there were no problems with the formulation of questionnaire items and the structuring of the questionnaire. Lastly, the questionnaire was sent to an information-technology expert and experienced researcher who scrutinised the questionnaire for any errors in design and any other potential technical errors. The reliability of the questionnaire was established using the Cronbach alpha method.

Prior to the distribution of the questionnaire, the respondents were contacted telephonically in order to obtain their permission to participate in the study. Thereafter, the questionnaire, together with the covering letter, was sent to the respondents via email. The respondents were requested to complete the questionnaire according to the instructions provided.

The responses to the questionnaire were processed using Statistical Package for Social Sciences (SPSS) software. The data were interpreted quantitatively using reliability analysis, descriptive analysis and significance tests. The results from the first phase of the empirical research were used to generate a final list of core tasks and skills that are relevant to editors across all sectors of the South African editing industry. This list was used to develop a preliminary set of core editing standards, which formed the basis of the second phase of the empirical research.

#### **1.5.2.2 Phase two: qualitative semi-Delphi study**

The second phase of the empirical research entailed finalising the list of core editing standards. The purpose of this phase of the research was to ensure that the standards document is well formulated, clear and accessible. The methodology selected for this phase of the empirical research is the semi-Delphi study. Churchill and Peter (1995:146) define the Delphi technique as a “method of forecasting that surveys experts, averages the results, and repeats the survey”. This process involved sending a survey to experts, asking them to provide a forecast. The results were then averaged and sent to the experts again, requesting them to review the results and provide another forecast (Churchill & Peter, 1995:146). This process was repeated until consensus was reached among the experts.

A preliminary standards document, presenting a list of core standards applicable to all South African editors regardless of sector, and based on the final list of shared tasks and skills resulting from the first phase of the empirical research, was sent to four experts who are prominent role-players in the South African editing industry. The sample of participants for the semi-Delphi study was determined through judgement sampling, and participants were selected on the basis of their prominence in the industry as well as their involvement in regulatory organisations for editors.

Permission to forward the preliminary core-standards document to participants was obtained telephonically, and the document was sent to the participants via email, as this allowed the participants to comment in their own time. Once the participants' comments were returned the replies were analysed and any corrections to wording, formulation and presentation were done. This process was repeated until consensus was reached regarding the presentation and formulation of the standards. This final step therefore ensured the acceptability and accessibility of the final list of core standards for South African editors.

## 1.6 CHAPTER DIVISION AND OUTLINE

### *Chapter 2: Standardisation and the South African editing industry*

This chapter discusses the literature relevant to the professionalisation of the South African editing industry. Specifically, Chapter 2 focuses on outlining the status of the South African editing industry and discussing the need for the development of editing standards. In addition, examples of regulation and standardisation in the editing industries of Canada, Britain and Australia are discussed in order to determine how the formulation and implementation of standards may be managed. Furthermore, the benefits associated with the development of standards are highlighted. Examples of regulation in other fields of language practice (translation and interpreting) are also discussed.

### *Chapter 3: Identifying standards for the South African editing industry*

Chapter 3 delineates the various types of editing as discussed in key practical and theoretical texts. The various sectors of the South African editing industry are identified and discussed in terms of the editorial work related to working in each sector. Chapter 3 also identifies the tasks and skills associated with each sector of the editing industry, and based on this a comprehensive list of tasks and skills involved in editorial work is drawn up.

### *Chapter 4: Methodology*

This chapter outlines the methodology selected for the empirical investigation, and discusses the processes involved in the design of the research instrument, the sampling procedure employed in the study, the data-collection method and the statistical methods used to analyse the collected data.

### *Chapter 5: Analysis and interpretation of empirical findings*

This chapter analyses the data collected and interprets the results of the various statistical tests applied to the data sets yielded by the questionnaire survey. This chapter also discusses the results of the reliability testing of the questionnaire. Specifically, a descriptive analysis of the data is presented, followed by an analysis of the significance tests. Based on this, a list of textual tasks and extra-textual skills relevant to all editors, regardless of sector, is compiled. This chapter also discusses the results of the semi-Delphi study.

### *Chapter 6: Conclusions, recommendations and suggestions for future research*

Chapter 6 provides a summary of the research findings. A number of suggestions for further research possibilities are made, in addition to some recommendations for the dissemination of the standards developed in the study.

