

Scheduling and production - Thursday - Editorial track - Magazine Training International Notes - Carla Foote

What kind of a planner are you? Do you want everything laid out in advance, or do you like to wing it through a plan? For me, even when I was in school, I didn't want to wait until the last minute to finish something, I wanted to be done the day before so I could relax. My father did very well at university - and he was an engineer. He would talk about playing bridge the night before an exam, because you really couldn't cram effectively anyway - I adopted this philosophy. My goal with the editorial and production schedule is to sleep well the night before we go to print, not to be madly changing things.

Team effort - communication and clarity.

Producing a magazine is a team effort, between the business side, the editorial side and the design side. So communication and clarity are key factors in developing a workable schedule so that the whole team has enough time to do a high quality job on each aspect of the magazine production.

When I was talking about editorial planning in terms of the annual plan and a plan for each issue, we were focused on what goes in the magazine, or on the website or in the digital newsletter - how to plan so you have high quality content. In that editorial planning process we were looking **forward** - either to the whole year or to the next issue.

In the scheduling and production process - we actually **start at the end and look back** to see what steps we need to include to get to a live date on website content, a send date for digital newsletters, or a print date for a print publication.

- **Digital** - temptation is to not build as detailed a schedule - but it is still super important for quality assurance. Yes - digital can go up quickly, as opposed to print, but in order to have quality, you still need a good process or your quality will suffer. This is especially true if things are happening fast and you are reacting to them - yes - you might need to comment on a current event or post an article related to something happening in the news - but take a moment to pause, think about your audience, think about your mission. take one more minute to think. You won't be sorry.
- **Start with an end date** – when do you want your magazine to go to distribution (mail, event, etc).
- Realistic printer times – for quality, checks, assembling, check with a couple different printers, if one is promising a much faster process, make sure they quality/pricing/experience is comparable – check references.
- So from the distribution date, allowing for print time. You now have your “go to print” date – an important first step in your schedule.

- **Now, from the end, go back to the beginning.**

Slide- Phases of the process

- **A content meeting** to plan the content for the issue is your first step in the schedule. We talked about this in detail on Tuesday. If you are working on an annual plan, you might have one meeting for the big idea for each issue in the year (or quarter or whatever time period) but then you have another detailed content planning meeting for the particular issue. **Make writing assignments and give a deadline for content** (2-3 weeks works well for bimonthly or quarterly). Depending on who you work with for writers, some people need longer timeframes. It does amuse me when I'm talking to someone about a 400 word article and they say they need 3 weeks. I'm thinking, I could pound that out in an hour, let it rest an hour, and then finalize it in another half hour. I have found that working in the nonprofit sector makes me very efficient in my work! But you want quality, so you don't want to rush people. You will also learn over time, with writers you go back to - who meets their deadlines and who you have to pad things for.
- **Editorial review round before design** – because if lots of words are changing, it can affect the design. So it's a good idea to have a "raw content" editorial review before you go to design. Make sure everyone is comfortable with all the articles, topics, language, etc. You will still do a more detailed edit later, but this step is important for efficiency in design time. Sometimes at this stage you might decide to drop an article, the review team thinks it isn't the quality you need. You want to drop articles and add new articles before design, otherwise the designer has wasted time on a layout that will be dropped. Of course, it's not a perfect process, so sometimes these exceptions happen, but when we are talking about planning - we are talking about how you WANT the process to go smoothly, and you build in a little margin in the schedule for other things that may happen.
- **Outline the Issue:** Give the designer the big idea of the issue, page count, topics for each article/column, approximate word counts. Now, some of this step might depend on how you interact with the designer. I have worked in a couple of different situations. With Disciple and 12 pages, we are quite specific about what goes on which page. When I was with a longer magazine, 32 or more pages, we would give the content outline to the designer and she would come back with a thumbnail (an outline) of where the articles landed. Usually the beginning and end, and departments are the same, but sometimes there is flexible space in the middle. Also - if you have advertising or even organizational pages (house ads) these will affect the space and will be part of the thumbnail planning.
- Let the designer know if some content is coming in later – this way he can hold space and work on other pages, knowing that he can circle back later and pick up the last few

pages, it helps the designer plan his time on the project. If this is the case, be as specific as possible about what is coming in, how much space, word count, design idea, etc.

- Have the designer do a thumbnail (show one) that shows how the articles will flow and the order, etc. Editor and designer need to agree on this. If editor sees a different flow that would work better for achieving the big idea, then this is the time for communication.
- **Image approval.** I'm sure that different publications do this differently, but to respect the designer's time, you don't want them to spend lots of time on a complicated layout if your editorial team is going to reject the image that they have selected for the layout. So we do a very very rough image approval. It just has text dumped on the page, and includes the image the designer suggests for the page. He/she might include a couple of alternate images that could work with the content/topic and would work graphically with the article space. We then approve images prior to the designer spending lots of detail time on layout. Again, this step can vary based on how you and the designer work things out, but I always try to think about how I can be most efficient with the designer's time - so they can pour energy into the design, not into making needless changes.
- **Design review - funnel** - have quite a few people on preliminary design and review, then fewer opinions. too many eyes may not improve quality, it can just be lots of opinions, you need to funnel it down, decide - which cover, which image, feel like you never finish if you get too many opinions. editor manages the process of when to get input, now we are done, move on to next step. refined design - approve images. Might show cover ideas around to more people, but have to funnel it down. Watch your time - you can go through endless cycles. Stop. move on.
- **At least 2 rounds of design/edit**, with a set of fresh eyes near the end of the process:
- **Round 1 of design/edit** - The designer does as much design/layout as possible, then editorial team reviews the design/content. At this point not getting into small details (widows, orphans, line breaks, hyphens, because some words will still change). Depending on your editorial team, it is a good idea to designate one person for the detail copyedit, and another person for the big picture, organizational tone/voice/content edit – asking – how will the audience receive this content. If you are the only editor, force yourself to read through in different ways, once for detail and once for big picture.
- Round 2 of design/edit. The designer incorporates all the feedback from Round 1, and does more cleanup on the layouts – going for a “near final” on text flow, etc. The editor now finds someone with fresh eyes to have a hard look at the content for copyediting. The most common mistakes are headlines and captions. Also need to look for words chopped off, and spacing/font size problems.

- Someone to check all scripture references, fact checking, website link checking, addresses, phone numbers, spelling of names. You would be amazed at how often people mis-quote scripture - or they have the version wrong.
- **Author reviews** - and people quoted in pieces. fact checking and good relationships with authors. this is fairly clean - send pdf of article to author (or to subject of article) - sign agreement/contract/permissions - **be specific about process - when you need it back, definite deadline, the bus is moving**, sometimes an author doesn't like how we edited the piece. depends on who the author is - sometimes it's people who have never been published - we helped their piece, depending on how helpful the author is - am I going to go back to them again, or are they hard to work with. designer makes those last changes. It can be tricky where to place this. If you do it too soon, the author might feel like more changes were made without them seeing it, when they do see the final. If you do it late in the process, they have to know that it is too late to make many changes. If you have an article where you did make lots of changes in the raw content phase, it's a good idea to communicate that with the author, so they aren't surprised later.
- **Final** – One more fine tooth comb through by designer and editor – widows, orphans, awkward breaks, color correcting, etc.

Relationship with Editor and Designer

- Communication with designer on schedule is really important. If you are just getting started, set up a schedule, but be open to evaluating, tweaking schedule. And also allowing a little bit of slack time for “emergencies” that come up – there will be something unexpected in every cycle, so plan a little space for it. You can’t really plan for emergencies, but you can plan knowing that you might need a few days (or a few hours depending on your magazine cycle) space to an article that comes in late or a picture that doesn’t work, or permission that you are waiting for.
- The editor/designer relationship varies by publication. I have always worked with designers who read all the magazine content and think through the content and design. However, some designers might work more from a standpoint of wanting the editor to summarize the big idea of each article, not expecting that the designer will read the content. There isn’t a right or wrong, but I definitely have my preference in working with a designer who understands the content! If you do this differently and feel strongly, I’d really like to hear how that works for you.

What if you are the only person on the editorial team – no one else for fresh eyes?

- Set it aside and come back the next day.
- Read out loud
- Start at different places in the magazine for each time through – otherwise your first few pages are more likely to be error-free because you are always fresher there – read through backwards, or start in middle and read forward, then go to middle and go backwards.
- Slow down.
- See if someone else in organization who isn’t an editor might be good at grammar. We have a secretary we use for fresh eyes because she is just good at it – not on our team.

The plan versus reality – I am a firm believer in schedules and project planning, but sometimes you have to flex the plan a little. I would say that this most often happens when one piece of content is late coming in, either because the author couldn’t complete it on time, or maybe it is organizational information and you are waiting for a decision to be made so you can move forward on the piece. It’s ok to flex a little on a piece of content, but this is where we revisit the importance of clarity and communication. Make sure the designer knows that the piece is coming. The designer isn’t working on all the pages at once anyway, so you can slip some content in later, but for the overall design, you have to be firm about how much space you are giving to this late piece. What the word count is, and even what the topic and design idea is, so

that the designer can at least leave an adequate amount of space and mock-up the page so that when the content arrives, it can be designed more quickly.

I will also caution that whatever piece of content lands last in the magazine, be extra vigilant in editing that content, because this is where errors are more likely to occur. We had an article drop in late a couple of issues ago, and there was an error on a photo caption, because it hadn't gone thru as many editorial cycles as the rest of the magazine.

Even with the best project planning, you will need to be flexible – something unexpected will come up, so it's best to stay calm and figure out how to handle the change.

Several years ago I worked on a parenting magazine where we changed the frequency. After years of being bimonthly, we went to quarterly. It was a budget decision that was made fairly quickly, so we had to adjust a lot of schedules. What we realized after 9 months of going quarterly, is that we weren't happy with how the quarters were lining up with holidays and with our organizational schedule for the year. So we had to skip a month to get on the quarter schedule that would work better. The bump in the quarterly schedule was an unintended consequence of a budget change that had to be made. These kind of things happen in editorial work and publications, and while consistency is important for your publication, sometimes you have to just do the best you can in the circumstances and make a hard decision. What was problematic for us was the fact that the date for Easter moves around, and if we did a quarter that was Jan/Feb/Mar, April/May/June, some years Easter would be in the Jan issue and some years it would be in the April issue. If we had the luxury of planning way ahead for the change from bimonthly to quarterly, we could have probably avoided this issue and planned for the quarters - but we live in the real world and sometimes you have to make decisions quickly and then figure out next steps.

Who to include in the process

clarify who will review with decision-makers in advance

include specific review assignments, such as fact-checking, overall tone, etc. - helpful to think through -

fresh eyes

tips for those working as individuals or with small teams - by yourself or 1-2 people. -

sometimes you are doing all these different things - right now I am a fact checking, copyeditor.

right now, take a break, now I'm just reading for the big idea. you can do different editorial functions, but be conscious of what you are looking for. keep your head in whichever space you are in. what if you are all by yourself, can't do fresh eyes, recruit someone else. take a break

leave it for a night, go back the next morning. often we read from beginning to end. start at the end of the magazine, last article, go backward, you haven't read it that direction.

tips for those with large teams - colleagues at large magazine - more complex review cycles - 10 different reviews - have to manage the focusing of the process. lots of feedback early, have to hone it down, 6-8 people reviewing might be quibbling over word choice, but may not be improving the quality - as editor, manage the process

Troubleshooting

- clear deadlines
- late articles
- extra space - advertiser drops out - have thought about that in advance. have a couple of articles in "back pocket" - to drop in. breathing space - image, quote - pause.
- dropping content - author couldn't sign agreement. had to quickly fill in the space. (we will talk about short content in a Friday session, and some of that is content you can have ready to fill in).
- too many opinions in review process
- holidays - and summer vacation - plan ahead
- when you have to have a tight turn-around - warn people
- margin - plan that something will go wrong, you just don't know what - try to allow a few breathing days on the schedule.

Evaluate and refine your process

- evaluate at the end of the cycle- review the process
- where do you need more time
- where can you speed up the process
- which team members provided the best input
- which reviewers did not contribute to the process
- what do you want to change for the next cycle.

Example - evaluate - added a new permissions process - it was taking time and it also seemed abrupt to the people - they had a relationship with me because we had worked on the article. Then all of a sudden they would receive an email from someone they didn't know asking them to sign a legal permission form. It needed some smoothing. So we refined the process. Now, after we are near-final on the article, I send it to the person and copy the permissions staff, mentioning that they will be asked to sign a permissions form. It is less abrupt and more relational.

Practical application -

- Are you happy with your current process?
- What is the most difficult step in your process?
- What is one thing you want to change on next cycle?
- What is one schedule change you want to move to in future – long term?