PRODUCING PRINTED MATERIAL

Every organisation produces some printed materials, and whether you want to start a newsletter, create an annual report, or publish a book, the same principles apply. This Technical Brief explains the basics, and will help you to organise your materials production, or perhaps reorganise it.

Why publish?

The main reason for producing printed material is to share useful or interesting information with others. You may also wish to publicise your organisation, or to raise money by selling your material, but whatever the case the information had better be useful or interesting too! Start by asking yourself 'What is the purpose of disseminating this material?' and 'Who is the audience?'. Keep the answers to these questions in mind throughout the publishing process; they determine what format, language, level of detail, and system of distribution you should use.

If you are new to materials production, following these established procedures will help you to avoid costly mistakes. Depending on the size of your organisation, you may have some or all of the following skills or resources 'in house'. This Technical Brief will assume that you do not, but the same rules with regard to consultation, scheduling, and budgeting apply to both staff and freelances. Make sure that you use the expertise of your fellow professionals. For the purposes of this Technical Brief we will call the printed material the 'publication', even if it is not being published for sale.

Schedule

The first step is to produce a schedule that notes key dates and internal deadlines. It is imperative that a schedule is drawn up from the very beginning, and that everyone involved in the process has a copy and knows their own deadlines. An Annual Review, for example, may need to be ready for a launch, but cannot be produced before your accounts are ready. The schedule should include a period for consultation to allow time for you to get quotes or estimates from designers, artists, or printers. Once you have chosen your editor, they will help you to revise the schedule, which should be finalised once you have chosen your designer and printer and agreed deadlines with them.

Budget

The amount that you spend on a publication should be determined first and foremost by the purpose of the publication, and its target audience. You may have a set amount of money to spend on a publication, and this budget may limit what you are able to achieve. If, on the other hand, you are constructing a budget in order to try to raise the money to produce a publication, then you should aim for the best format for the purpose. The main costs that you will need to budget for include:

- author
- editor
- translator (where necessary)
- designer
- typesetter (if your designer is not doing the typesetting)
- artists
- photographic reproduction fees

- printing
- distribution

Even if some of these resources are in-house, find out whether you need to budget for staff time.

Origination
Editor
The role of editor varies, but in most cases the editor is the manager of the project, and the smooth progress of the publication will depend on them. If there is to be a project manager and an editor, it is important to clarify the roles at the beginning. It is usually the editor's job to get quotes from, choose, and commission all the external members of the project team, such as the author, designer, artist, and printer, and to ensure that everyone knows exactly what they are contributing, and that they complete their work on time. The drafts of the publication will return to and be checked by the editor between each link in the production chain.

The editor will also plan the publication, and commission the author. The editor must ensure that the author understands exactly the subject to be covered, the purpose of the publication, and the target audience. After the author submits a manuscript, the editor works through it, compiling questions for the author where the text is unclear, correcting spelling and grammar, marking up the text to highlight headings, bullet points, captions, etc. for the designer. The editor will also compile a list of graphics, illustrations, or photographs that are needed from the artist to clarify or illustrate information in the text. At each subsequent stage of production, the editor will proof-read the text, read it carefully for mistakes and check that any earlier alterations have been incorporated. Finally, the editor must ensure that the draft and final manuscripts are authorised by a nominated person within the organisation.

Designer
The editor should get quotes from more than one designer if possible, telling them the aims of the publication and who the target audience is. Show the designers examples of other similar publications that work particularly well, and the finished manuscript if there is one.

Author
If a manuscript does not already exist, the editor will commission an author, who will research, collate, and write a manuscript to the editor's detailed specifications. Agree the topic to be covered, the tone and style, the number of words, the deadlines, and the fee, and confirm everything in writing.

Artist
It may be necessary to commission drawings, illustrations, or photographs to complement the manuscript. Brief the artist on the style that you want, the number of illustrations and the content, the size that is needed, the deadline, and agree a fee per illustration or for the entire job. You may also want the artist to provide an illustration for the cover of the publication. Photographers need to be briefed in the same way, specifying colour transparencies or black and white photographs, agreeing a fee, a deadline, and what expenses will be covered. Again, confirm everything in writing.

Format
The shape of your publication, the number of pages, and the number of copies you print (the 'run') will determine the cost of printing, which is often one of the largest budget items. An unusual shape may mean that the printer has to use large sheets of paper and trim off a lot of waste. Consult with your printer (or several printers) to see what shape their machines are best equipped to print, and whether the sheets of paper they use cover 4, 8, or 16 pages at a time.

Colour

Most publications are printed in black (one colour) on white paper. You can add another colour (a 'spot' colour), a second colour (two colour), or go for 'full colour' (i.e. four colours). Each of these steps is progressively more expensive, and if you are interested in using colour at all you should get a series of quotations from your printer to see what is the optimum use of colour for your needs.

Print run

There are a minimum number of copies that the printer will need to print to make the setting up of the machines worthwhile. After that minimum is printed, it becomes much cheaper to print more copies. It may cost, for example, £3000 to print the first 3000 copies, and only £100 for each 500 copies after that.

Paper

Your printer will also advise you on the weight (or thickness) and surface of paper that you should use, although you should show them examples of what you had in mind. If you are printing in colour you will need a heavier paper, and you may need one that has a special coating to make the colour printing work better.

Structure

Every publication follows a basic outline, although it may not include all of the sections below.

Cover

The front cover should include the title and sub-title, the author's name(s), and the name of your organisation. The back cover usually includes a short description of the aims of the publication and who it is written for; a short biography of the author, if relevant; and a description of the organisation producing the publication, along with their contact address. If the publication is to be sold through booksellers then a barcode should also be included. The inside pages of the cover can include more information about the organisation, advertisements, etc.

Prelims

This is the name given to the first 'preliminary' section of a book, which includes the title page, reverse title page, acknowledgements, contents page, list of abbreviations or acronyms, glossary, and preface. This section is numbered (whether they are printed or not) with roman numerals (i,ii,iii).

Body

The main text, usually starting with an introduction, and numbered with Arabic numerals (1,2,3). In English a publication begins with a right-hand page, so right-hand pages are odd and left-hand pages are even numbered.

The production cycle

Project manager sees need for publication, defines purpose of publication and target audience, and creates initial schedule, taking into account internal deadlines

Project manager appoints editor

Editor and project manager agree on important final deadlines and overall budget

Editor consults with designers, typesetters, and printers, obtaining quotes and advice

Editor plans publication and commissions author

Author writes text and delivers to editor

Editor corrects manuscript, refers queries back to author, and commissions illustrations

Editor gets organisational approval for finished manuscript

Editor gives revised manuscript with illustrations to designer

Designer produces 'flat plan' for editor's approval

Designer lays out publication, and produces page proof

Editor reads thoroughly, correcting any mistakes

Editor gets organisational approval

Designer produces revised proof

Editor delivers revised proof, disk, and artwork to printer, with Print Order

Printer plays out film

Editor checks against proofs

Printer prints publication

Publication distributed according to plan

References
If the publication includes references, these must be consistent and must include at least the title, author, publisher, date, and place of publication.
Appendixes - At the back of the publication list, in appendixes, any other information that could be of use to the reader.

Index
Indexes are very helpful to the reader. Try to include one if it is appropriate.

Production
Designer and typesetter
Traditionally the role of the designer was to create an overall style or look for the publication, specifying page sizes and formats, typefaces and sizes, and sometimes creating original artwork for covers or illustrations. The typesetter would use the designer's specifications to lay out the publication in preparation for printing. Today designers often work using desk-top publishing (DTP) packages on computers, and they may do the work of the typesetter in some cases. Clarify from the beginning what the role of the designer will be, and if there is a typesetter decide what their role will be.

House style
One of the main roles of the copy editor is to make the text of a publication consistent. Some English words have more than one correct spelling, for example organise and organise, but these must be standardised. There are other variables too: whether headings are set in bold; where upper case letters are used; in what order the information in references is written; whether foreign words are italicised, etc. Every organisation must make a 'ruling' on these variables, and the collected rulings – the House Style – should then be issued to all staff and freelances.

The main way to simplify this task is to specify which dictionary has the definitive spelling (no, they do not all agree!). ITDG Publishing, for example, uses the Oxford Dictionary, which favours 'z' instead of 's'. The Oxford Writers' Dictionary is a smaller reference book full of awkward words, abbreviations, words that should be in italics, and difficult or often misspelled proper nouns. Make sure your thesaurus matches your dictionary.

Every organisation should also append a regularly updated list of definitive spellings of words that are unusual to outsiders but are regularly used within the organisation – for example do you use drinking water, drinking-water, or drinking-water? – and of words that are new or changing, and not in the dictionary, such as decision-maker. The spellchecker that comes with most word processing packages can help. On older packages you can add words to the dictionary but not delete them, but on newer packages there is a more sophisticated Quick Correct facility, whereby the machine will always replace one spelling of a word with another once you have customised it.

Another very useful book is Judith Butcher's Copy-editing. This book uses the Cambridge spellings, and is still the best explanation of the process of editing. It covers all the basics plus scientific notations, American spellings, proof correction symbols, and devotes a whole chapter to references.

Fowler's Modern English Usage and Partridge's Usage and Abusage provide valuable advice when you are not sure if you are using the correct word, or using a word correctly. George Orwell's 1946 essay 'Politics and the English Language' will be of interest to anyone who wants to write.

The designer takes the edited manuscript and the illustrations and lays them out in an attractive, useful way (on computer or on paper). The designer will first produce a 'flat plan' showing the editor on which page each part of the text and illustrations will go. Once that is approved, the designer or the typesetter sets the text in pages, and the photographs and illustrations are set into the computer file using a scanner, which converts them into a digital format that the computer can read and store on a disk. (If the designer does not have a very good quality scanner, then it is better to get your printer or another specialist to do the scanning for you.) The designer or typesetter produces a set of 'page proofs' for the editor to proof-read. Once the editor has checked the page proofs thoroughly and made any corrections (and this is the last stage at which corrections should be made) the designer or typesetter produces revised proofs. The editor then takes these 'revises' to the printer, along with a disk and any artwork that the printer will need.

Printer
The editor (or project manager) issues the printer with a 'Print Order', specifying exactly how many copies should be printed and the paper that they have agreed, and telling the printer where to deliver the printed publications. The printer scans in any photographs or artwork as directed, then uses the disk to produce film from which in turn the printing plates are made from which the publication is printed. The editor (or project manager) checks a set of proofs from the film, to insure that they are exactly the same as the revises, and then authorises the printer to print. Printing systems are changing rapidly, and depending on the technology that your printer has available, this procedure will vary. Make sure you understand from the beginning what system your printer will be using, and what they expect from you.

Distribution
The method of distribution that you use will depend on who your target audience is. If the document is to be distributed free to selected people then you must ensure that your mailing list is complete, up-to-date, and accurate. Specialised distributors may be able to label, package, and post your document more cheaply than you can do it yourself, so be sure to get a quote before you decide. If you are sending out a regular newsletter, then you will need to budget for maintenance of the mailing list, or maintenance of the subscriber list if you are charging a subscription. If you want to sell your publication, then you will have to invest in marketing it, either to booksellers or to your audience, probably both, particularly by sending free copies out to people who will review your publication in, for example, magazines or newsletters. Even if you are going to sell the document, there will probably be a small list of people to whom you will send a free copy, including the author, donors, project team, and the head of your organisation.

Useful contacts and further information
A dictionary and thesaurus – standardise on one of the main publishers.
Judith Butcher, Copy-editing: The Cambridge Handbook. 2nd Edition, Cambridge University Press, Cambridge, 1989. ISBN 0 521 25638 0.
H.W. Fowler, A Dictionary of Modern English Usage. Revised edition (Ernest Gowers, ed.), Oxford University Press, Oxford, 1996. ISBN 0 19 281389 7.
George Orwell, 'Politics and the English Language' Horizon, April 1946. (This essay is often included in collections of Orwell's essays and journalism.)
The Oxford Writers' Dictionary. R.E. Allen (ed.), Oxford University Press, Oxford, 1990. ISBN 0 19 282669 7.
Eric Partridge, Usage and Abusage: A guide to good English. 2nd Edition (ed. Janet Whitcut), Penguin Books, London, 1995. ISBN 0 14 051281 0.

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