Agenda

- Contract Process/Know Your Lingo
- Know Your Role
- Budget
- Government-contracted Documents
- Template
- Technical/Scientific Documents
- Compromising vs. Standing Your Ground
- Conclusion
Contract Process: Know Your Lingo

Client: Request for Proposal

Contractor: Proposal

Both: Negotiations

Client: Statement of Work

Both: Contract
Contract Details: Know Your Role

- Review SOW
  - No services offered outside of SOW
  - Opportunities for add-on value
  - Editing department or built into other teams

- Know expectations
  - Content/flow review vs. Technical review
  - Line edit vs. Content/Flow review
  - Editing AND formatting
    - How to share the duty
    - How to share the billable hours

- Supervisors
  - Client
  - Contractor
Contract Details: Know Your Role

- Know when your role comes into play
  - Kick-off meetings
    - Increase general knowledge of subject and of client expectation
    - Gain sense of schedule and timeline
    - Understand division of labor
  - At the end
    - Potential to cause rushed editing
    - Edit is subject to tightened hours
    - Risk of project unfamiliarity
  - During
    - Need clear direction to avoid wasting hours
    - Face risk of document alteration prior to delivery to client
Contract Details: Know Your Budget

- Every hour of work must be billed (billable hours)
  - Budget is pre-determined
    - Understand how editing hours are distributed – own “department” or included in technical teams
    - Defer to authors for editing hours or vice versa
    - Know how hours will be spent
    - Stay within hours
    - Keep track of and record billable/billed hours
  - Scale back when necessary
    - Know how and when to adjust level of editing
    - Allow time for line edit vs. time for content read
    - Do not give away work for free; client needs to know the value of editing
    - Editing is hard to qualify; do not cheapen it by rushing through or working beyond allotted hours
Government-contracted Documents

- Confidentiality
  - Intranet information
  - Signed confidentiality agreements
  - Unspecified information

- Image permissions
  - Government must obtain permissions
  - Public domain does not require permissions
    - Everything created under the contract (funded by the government)

Purchase: [Image]

Permission: [Image]

Adaptation: [Image]

Own: [Image]

Source: DOE/NETL
Creating and Working with Templates

- Templates
  - Know client guidelines
    - Reference style
    - Aesthetic
    - Existing editing style guide and other editing guidelines
    - Logo standards
  - Maintain consistency and quality control
    - Supports a brand standard
    - Aids in editing
    - Promotes professional aesthetic
  - Update to stay current
    - Fresh template every contract
    - Periodic updates as trends change
Working with Technical Documents

- Components
  - Acronyms, wording, and terms
    - Acronyms are used regularly
    - Technical wording is hard to identify as incorrect
    - Industry terms can sound cliché and/or confusing
  - Line editing vs. story arc
    - Both need attention, but not during same read
    - Stay within budget
  - Executive Summary
    - Know what it is and what it needs to include (handout)

- Communication
  - Clarify intent and terms
  - Keep authors informed of any delays or changes in editing schedule

Note: Tech editors are not necessarily schooled in a technical field, and that is okay
Compromising vs. Standing Your Ground

Know when to compromise or stand ground

- Client wants number-based references
  - Compromise: Offer option of APA (author/date) or ISO-690 (number-based) references
- Team wants their reports to stand out from the rest
  - Compromise: Use standard template with different picture, caption, or heading styles
- Client prefers footnotes over an official reference section
  - Stand ground: Footnotes would change the aesthetic of the brand and disrupt consistency
- Client prefers the endnote function over automated references
  - Compromise: Author/client preference; both appear at the end of the document
- Author does not want to include all of the front-matter pages (acknowledgements, acronym list, author list, etc.)
  - Both: Template includes required information (client logo, disclaimer) and unrequired information (author list, acknowledgements)
  - Compromise: If this becomes a common occurrence, you might consider updating the template to accommodate the trend
Conclusion

- Know your work boundaries – role
- Know your work boundaries – budget, confidentiality, template
- Know the topic boundaries – SOW, technical not creative
- Know when to compromise or stand ground – authors vs. convention
Questions and Contact Information

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