Taking it back:
How to train your colleagues after an ACES conference

April 21, 2006, Cleveland

John Boogert (boogertj@rockymountainnews.com)
and Zoe Cabaniss Friloux (frilouxz@rockymountainnews.com)

Before you start, plan

Tom Bowers, interim dean of the School of Journalism and Mass Communication at the University of North Carolina at Chapel Hill, shared these tips for sharing what you've learned at last summer's Institute for Midcareer Copy Editors.

You can't share everything, so pick one topic.
  Strategies: What do co-workers need? What interests you? What's the easiest?
People need to know:
  Why the knowledge or skill you're sharing is important.
  When and how they will use it.
  How it relates to what they already know.
Presentation tips:
  It's important to have learners DO something.
  Give corrected copies of exercises.
  Explain the correct answers.
Start each training session with a preview agenda, and end it with a summary.

(Tom's slides are at http://www.ibiblio.org/copyed/2005/Sharing_05.ppt. His e-mail address is tbowers@email.unc.edu.)

PowerPoint: Beyond the instructions

There are books and Web sites that explain the technical side of using PowerPoint. But once you've figured out the basics and are creating slides for a presentation, keep in mind these tips from ACES President **Chris Wienandt** (cwienandt@dallasnews.com).

1. Let your slides emphasize the points you're making; don't simply read what's onscreen.

2. Limit the amount of text you put onscreen.

3. Make the type big enough to read -- and give your audience time to read it.

4. Keep your backgrounds simple. They aren't what your audience should be focusing on.

5. Don't go nuts with transitions. Pick one effect and stick to it.

Hank Glamann, hank.glamann@copydesk.org

Though it might be too late for this year's conference …

First things first. If you are attending this conference with one or more colleagues from your newsroom, get your heads together about who will attend which sessions. **You'll cover a lot more ground if you divide and conquer.**

In the same vein, remember that workshops are not the only learning opportunities here. So, don't spend all your time between sessions or during social events hanging out with people from your shop. You can talk to them anytime. **Seek out new acquaintances … and new ideas.**

Speaking in front of a group probably isn't on your list of favorite activities. Most people are reticent in such situations; many are even fearful, some to the point of absolute terror.

This phenomenon no doubt contributes to ACES conference attendees' reluctance to attempt to duplicate conference workshops upon returning home.

There's an easy solution. **Just approach the session in which you're interested as if you were a reporter assigned to cover it.**

Start with a little research. At a minimum, put together some biographical information about the speaker or speakers. The conference program probably will give you everything you need; certainly it's a good start. If you have a bit more time, locate articles pertinent to your topic in industry journals, in print or online, and read them as background.

Make copious notes during the session. Concentrate on major points, of course, but don't neglect quoted matter. You'll need plenty of it to craft an interesting story. Question-and-answer portions of programs can be a rich source of good material, as well, so make note of what goes on there.

After the session, get the names of and other basic information about audience members whom you want to quote, so you can do so by name.

Introduce yourself to the speaker and ask any follow-up questions you may have. You might want to ask for a business card, too, in case something comes up later. Ask if you may make use of any handout materials in your story, and, if you are so inclined, in duplicate workshops back home. **Do not assume that it's OK for you to use handouts.** Ask.

Also, do not assume that it's OK to make an audio or video recording of a session unless you have secured formal permission in advance, from both ACES and the speaker. This is not recommended, in any case. Use your notes.

Now, it's time to write your story. Do it as soon as you can, while the material is fresh in your mind. And make it sing. You know how to do that, right? After all, you do it every day when you're at work.

If you don't have a computer with you, they're available in a number of places: Café ACES, the hotel's business center and nearby commercial establishments. Or perhaps a colleague could lend you one. If all else fails, fall back on pen and paper. It is still possible to write a story, at least in preliminary form, without the aid of a computer.

When you're through writing, hand your story over to a colleague for editing. Remember, everybody needs an editor.

Now you're ready to publish, and you can do so in several ways, on the home front and elsewhere.

If your newsroom produces an in-house newsletter or similar publication about journalism issues, it's a natural spot for your report. If your newsroom does not produce such a publication, you might consider helping to start one, with your story as a feature of the first issue.

If your newsroom has an intranet, it's another natural spot. Again, if not, consider helping to start one.

Another option is to simply print your story out, photocopy it and distribute it to your colleagues. If you want to doll the story up a bit, create a paginated version – complete with headlines and perhaps even a breakout box or a digital photo or two – for duplication and distribution.

You can also send the story around by e-mail.

If you're interested in a much larger audience, consider submitting your story for posting as part of our convention coverage at www.copydesk.org. If you want to go this route, contact Jeff Pierron at jpierron@columbus.rr.com. Depending on your topic, it might not be too late for this year. If you claim a session early next year, you'll probably be in luck.

Publishing your story in whatever form is a worthy effort all by itself, and if you don't want to do anything more, that's OK.

But, if you want to go a step further, use your story as the starting point for discussion during a staff meeting or training session upon your return home. If you don't have such meetings, consider helping to get them started. If you don't feel comfortable leading the discussion yourself, ask a supervisor or other colleague to take that role.

Tom Paquin, tom.paquin@ecpc.com, Eau Claire, Wis., Leader Telegram:

I've used the great handout from Merrill Perlman from the If I Knew Only session to e-mail three or four troublesome words to the staff every week or two, explaining the proper use for each. It makes for a quick read with good information sinking in over a couple of months.

An excerpt from the handout (courtesy of Merrill Perlman):
mishap
More than 200 people were downed in the mishap.
That's not a *mishap*, that's an *accident*, or, if it's serious enough, maybe a *disaster*. While Webster's says a *mishap* is *an unlucky or unfortunate accident*, the connotation is that it is a small accident, one without serious consequences — a fender-bender rather than a 50-car pileup.

Megan Lee, megan.lee@monterey.army.mil, Defense Language Institute Foreign Language Center, Monterey, Calif.,

Tip: The first thing to remember when developing training material is to secure a signed permission of the presenter or author to use portions of the materials in your presentation and/or hand-outs. Obtaining permission simplifies your preparation, since you may scan, photocopy and use portions of the materials "as is" without having to re-write or re-develop a completely original work. If you know you'd like to bring back permissions with you, type up and bring along blank permission forms to obtain signatures at the conference.
Below is a sample of a form that can be adapted to individual situations.

(Name of organization)
(Address)

Dear (name),

Thank you for your presentation, (title), given at the ACES 2006 conference on (date). I am planning to develop a training session for my colleagues at (name of organization) using ideas and materials that I've collected at the conference.

With your permission I would like to use portions of your materials, including (selections from the handouts, slides from the PowerPoint, images, text, etc.) in in-house training materials I will present to my colleagues. The portions of material used from your presentation will be
intended for viewing only, and will not be made available to commercial parties for commercial use.

In the acknowledgement section of the training materials and related documentation, I will include the appropriate acknowledgement of your materials.

I would appreciate your signature below allowing me to use the materials in this manner. Please feel free to ask me to clarify any questions you may have. Thank you for your time and consideration.

Sincerely,

(Signature)
(Typed name)
(Title)

PERMISSION: I grant permission for (name) to use portions of (handouts, slides from the PowerPoint, images, text, etc.) from my presentation, (title), for in-house training materials that s/he creates for colleagues at (organization name), which will be for non-commercial purposes only.

(Signature)
(Typed Name)
(Date)

Barbara Tarshes, btarshes@pe.com, Riverside, Calif., Press-Enterprise

I find it handy to have accessible tip sheets, style points and handouts. I keep copies of the most useful information in a three-ring binder on my desk. Some are handouts, some are notes I have taken at sessions that I have rewritten for staff handouts. I file away the handouts I use less frequently.

When someone says she has trouble figuring out percentages, I can open the chapter on editing and provide a copy of Mixing Math and Words from Copy Editor magazine or By the Numbers from the Editor's Toolbox.

Having trouble with the active and passive voice? I printed out the Owl Online advice from the Purdue University Web site (find the link through the ACES resources page.)

When I get back from ACES, I type up my notes on sessions of general interest - business editing, math, science, armed services etc. - and put those in the binder. Of course it has a credit to the speaker along with the date and location of the ACES presentation. Example: I have several sheets on non-traditional work schedules. If I am able to implement them, I will be prepared with ideas from several ACES presentations.

I have the binder subdivided into these categories:

Editing	Caption writing	Checklists for editing
Hiring	Scheduling	Management
Slotting	Style	Ethics

Navigational tools (for us that means refers, skyboxes, moreabouts, breakouts.)

and internal categories:

Manual	Library	CCI

If someone is having difficulty with possessives , for example, I can grab the nifty handout I wrote on Proper Nouns (plural and possessive) from the Check List category.

I use my daily notes to the desk to pass along snippets of information from the conference sessions. Last year, I broke down the grammar quizzes and emailed them as a Question of the Day to a newsroom-wide distribution list. I was surprised at how engaged non-copy editors became. I had a note from the chief of graphics saying she was learning something and from photo editors who were enjoying the chance to showoff their knowledge.

I also have as many handouts as I have been able to grab over the years in a file drawer categorized by year or topic, as appropriate. (I find if I over-categorize things, I can't find them when I need them.)

Finally, I have put together a folder for new, less-experienced hires. In it are handouts from editing and writing workshops we have held internally. It is quite a bit of information, but a copy editor who wants to impress will read, learn and apply.

Clare Noonan, cnoonan@modbee.com, Modesto Bee

Here at The Modesto Bee, we do a lot of in-house training. One of our best proofers, Wayne Clay, did a workshop on how to proof.
I did a workshop on grammar, concentrating on the mistakes we see over and over again: that/which; its/it's; subject/verb agreement, etc.
Our best headline writer gave us a handout with her ideas on how to come up with sparky heds.
(Presenters' note: Headline writer Nan Austin's ideas are included in the handout distributed during the "Winners tell all" session in Cleveland.)

Ron Smith, ronsmith@journalsentinel.com, Milwaukee Journal Sentinel

We are in the process of working on a video, "Keen Eye for the Reporting Guy (and Gals)," that we will use to introduce the newsroom to what the copy desk does. It remains in the production phase as of March 30, 2006. Stay tuned!!!

Lisa McClendon, lmclendon@wichitaeagle.com, The Wichita Eagle

I've done workshops for my copy desk in the past -- basically what I did was picked out four or five sessions that I thought we could all really use, took the handout and used it or made my own handout from the notes I took. I trimmed things down so the workshop would run for half an hour or so (who has time for more?) and did them once a week or every other week for a few weeks. Everyone in the newsroom was invited, not just copy editors. (Reporters can gain quite a bit from these, too.)
The best piece of advice for doing this: Have lots of examples. You need actual examples to work with and if you don't have time to comb through your own paper looking for them, then use the ones from the session, which means be sure to write them all down!

Larry Sparks, larry.sparks@owh.com, Omaha World-Herald

In the past, we've tried to set up a time and room to gather and have pizza and have a discussion. I try to go over the things that would most apply to our rim -- headlines, text editing-type things. I've also found the sessions on math usually have some pretty good handouts. I make copies of all the handouts I think will be of use and and let folks know where they can find all the stuff I brought back that I didn't make copies of. The booklets on military terms have been helpful in the past, since we have a very large Air Force presence here.
I've always tried to take good notes at the "Inside Reader's Heads" sessions Alex Cruden does. I think it's good for copy editors to hear out what the outside world thinks of what we do.

Kathy Schenck, kschenck@journalsentinel.com, Milwaukee Journal Sentinel

Journal Sentinel Copy Desk U.
The concept: Kathy (AME for copy desks) or a member of the desk does a one-hour session, and deskers are given time out of production to work on it. Or there is a guest speaker. And of course there are refreshments.

Fall semester (all sessions were on Tuesday)
Aug. 30 – Kathy will lead a discussion about headlines, cutlines and blurbs and how to make them work better together. Bring your tips and tricks.
Sept. 6 – Kathy will lead a discussion on critical thinking. No nit-picking allowed as we go through big content questions we face.
Sept. 13 – Betsy (our publisher) will be by to talk about what's going on in the company and to answer your questions.
Sept. 20 – Pete (night desk chief) will teach us all the math we need to know. Bring your number puzzlers, and he'll figure them out.
Sept. 27 – Marty (our editor) will talk to us about the state of the paper and will answer non-smart-ass questions. (Hear that, Dan and Ronshine?)
(**Oct. 1 –** We'll continue our training at the ACES Midwest conference at Marquette. Please let me know by Sept. 1 if you want to attend.)
Oct. 4 – Punctuation, are you ready? Punctuation, let's begin. We'll bring our favorite nits and you can bring yours.
Oct. 11 – Christine (DME/visuals) will tell us about the paper's conversion next year to the 48-inch web. She's leading the charge on this project for the whole company, so this is a chance to get our suggestions and concerns heard early.
Winter semester (days rotated to include more people)
Wednesday, Jan. 11 – Marty and George (managing editor) will be by to talk about the future of the newspaper. Nut graph: the Internet plays a bigger role. Starts at 4:30.
Thursday, Jan. 19 – Cutlines and Cutheads – Making the Most of What Readers Read Most. Bob Helbig (assistant desk chief) and maybe a special guest from the photo desk.
Wednesday, Jan. 25 – Ronshine (day desk chief) will do his ACES presentation on effective communication. I've seen it five times and I still can't get enough.
Thursday, Feb. 2 – Mistress Queenie will referee the Grammar Smackdown. Who knew language could be so violent?
Wednesday, Feb. 8 – New AME/business Chuck Melvin will give us his insights on the business section, our headlines and tips for producing clear, interesting business copy. Then we'll ask him questions. Be nice.
Thursday, Feb. 16 – Crime & Punishment. This session will be way more fun than that existential Russian novel. Bob and Carol (slot) will impart their knowledge of cops and courts. And we'll hold them to an hour.
Wednesday, Feb. 22 – Headline Iron Chef. You read the stories and have two minutes to come up with the best headline. Fabulous prizes!
Thursday, March 2 – Everything You Wanted to Know About the Zones but Were Afraid to Ask. Dr. Joey (zones slot) and other zoners will give you frank answers.
Wednesday, March 8 – CCI: One Year Later. What's working, what's not and what we can learn from each other. Kathy will moderate.

Staff meetings

Whether they're a gathering of all of a newspaper's copy editors (and/or designers) or limited to a specialized group, they can present training opportunities of their own. Some members' thoughts:

John Reiter, jreiter@ajc.com, Atlanta Journal Constitution

I have a strong aversion to meetings, but about two years ago I started, with some trepidation, to convene monthly meetings of the dozen or so members of the Atlanta Journal-Constitution Features copy desk. I collect headlines and cutlines through the month to talk about. I make copies and distribute them to everyone at the start of the meeting. I usually have at least a dozen examples of headlines and cutlines that I have changed, and one exercise is to print out the before and after (without so identifying them) and ask the group which they prefer and why. Sometimes people prefer the before to the after, which is always educational for me.

I think the monthly meetings have been well received, and they have attracted the participation of the manager of AJC's copy/design desks and the assistant manager.

Gerri Berendzen, gberendzen@whig.com, Quincy, Ill., Herald Whig

We hold weekly staff meetings. Since we're a PM, we have them right after deadline. We usually meet about 30-40 minutes, never longer than an hour. I rotate days, so it doesn't always fall on the same person's day off.

Generally, I handle about 5 minutes of office business first. Then the bulk of the meeting is brainstorming and discussing concerns and problems.

Once every five weeks or so, the managing editor attends and we discuss some specific concerns we have, in a non-threatening manner. For instance, how to handle a shrinking newshole and getting reporters to write tighter, or concerns we had about consistency in design between news, sports, etc. (We're an editing/design desk.)

About once a quarter I spring for pizza or sandwiches and we meet through lunch. It's been a good bonding time and we've gotten some issues out in the open - instead of just letting everyone grumble.

I wish we would have started this years ago (but -- and this is no lie -- I've been inspired by ACES to do more along this line. And having young editors ask for more "wrap" sessions helped, too.)

This is just an aside, but the newsroom here never had it's own conference room. We had to use the one in advertising. Several months ago they remodeled and we have a comfy new conference room right off the newsroom. It's amazing how much that helped us not "forget" about having meetings.

Scott "Jake" Jacobson, sjacobson@kcstar.com, Kansas City Star

Most of our desk meetings fall into two categories: **Copy Talk** and **monthly training.**

Copy Talk is our monthly state-of-the-desk meetings. We cover major issues -- the KR-McClatchy sale, redesign timetable, etc. -- and smaller issues like style points and events to mark in their planners. These usually last a half-hour to 45 minutes. I was pleasantly surprised to find that when we went a couple months without these meetings, people wanted them to return.

Monthly training is something we've been doing now for seven years. Our assistant copy chief coordinates the topics and months with people on the desk who have something they'd like to teach or discuss. The discussion leaders can be anyone on the desk, from newest hire to copy chief. Recent topics have included math in journalism, crafting better headlines, consistent capitalization and focusing on the reader. These discussions are just that, conversations involving everyone in the room and usually involving examples that people either bring in or work on in the session. These usually last about an hour, depending on how chatty people get. Chatty is good.

Two occasional formats that I've messed around with on our desk: **small groups** and **smaller groups.**

Because I believe that some people clam up in large-group environments -- regardless of how well they know the people in the room -- I experimented with various group sizes. First, I split the desk into **three groups of eight people** -- Copy Blocks, as I called them. These groups were encouraged to meet monthly. They got to choose discussion topics and formats. While these were enjoyed, the lack of structure (which I thought would be inviting) was their downfall. No one wanted to step on anyone's toes and take the reins, so the frequency dropped off.

Another format was the Jake Break: **two or three people meeting with me at a time,** airing whatever suggestions or grievances they had. These led to some immediate results -- getting photographers' phone lists, reporters' contact info on the tops of stories, etc. -- and the empowerment of copy editors who didn't think their voices had been heard. The lineups of the Jake Breaks changed every month as different people's schedules meshed, and different permutations made for a wide variety of topics. These seemed to be enjoyed by everyone on the desk, but monthly may have been a bit much. By the time we finished the January meetings, February ones were upon us and people felt like we had just met.

Jan Jordan, jan.jordan@chron.com, Houston Chronicle

n Set aside a dedicated time each week for a 30-minute staff meeting.
n Keep it as short as possible and back it up against the 5:30 meeting in the same conference room so it can't run long. If we don't have much to cover, I start later and still stop on time to show the editors I'm not there to waste their time.
n Follow an agenda that I've distributed in advance and cover each item as quickly as possible. I want to keep the copy desk highly informed, but also want to give editors time for questions or comments. They need a forum.
n Keep track of what we cover each week and make sure we're doing some teaching, not just addressing housekeeping issues.
n Choose the training portion based on what we've encountered that week, what we need to remind people about, etc. A list of some topics we've covered is below.
n Have other editors prepare a short training session. This allows them to develop expertise in an area and work on their speaking skills, and feel like part of the team.
n Turn the meeting over to an assistant when I'm away. This gives others a chance to lead and gives staffers a chance to vent anything they might not bring up when I'm there. I always hear about it later and can fix problems once I hear the complaints.
n Require that editors who attend outside training report back to the staff.
n Invite editors from other departments to tell us what changes we can expect from their departments or how we can work better with them. Often, editors who just wrote proposals to get their jobs are passionate to change things and are open to our input.
n Try to convey my passion for the business, the product, the copy desk and readers.
n When we don't have time for a meeting or when I've attended a managers' meeting that was on the record or when I have too many housekeeping items to cover, I'll do a meeting on paper and distribute it. Sometimes those spur questions or comments that lead to other meeting topics. I often insert a supplemental training handout.

A sample of training topics covered in the past year:
n Goals (Jeff's [he's the executive editor], annual, five-year, and how we fit into that)
n Goals for the department, both mine and theirs. I have to write mine out and present them to my bosses every year, so I have copy editors do likewise.
n Mentoring program … how-to for mentors and mentees.
n Layering inside pages
n What heads grab you? Split them into groups and had them tell me which headlines sold papers or made them read the story – why, why not?
n How to brainstorm heads for A1, collaboration
n How to work a package with several elements
n Paper-of-record headlines…what are we trying to be?
n Math in the news pages
n How to handle late news if you're late man.
n Coding tricks (while layout people did this, slots and rims did a separate session)
n Fact-checking
n Sports in the news
n Anonymous sourcing … how to deal with it.
n End of year, back to goals … how'd we do, what do we want to do next year?

Merrill Perlman, meperl@nytimes.com, The New York Times

On whether all of the Times copy editors ever meet together:
There's only one room big enough for all the copy editors -- the auditorium -- and I've never tried to get them all together. Impossible anyway -- someone would always be off.

On smaller gatherings:
I do have occasional meetings with the desks -- usually a couple of times a year -- as well as informal get-togethers with individuals. The slots on various desks handle things in their own ways. Metro, for example, will have semiregular meetings with as many people who can come. Other desks are small enough and work the same schedules (4- or 5-day operations vs. 7-day operations) that they can actually meet and talk about other issues while working. Usually there's an agenda to a meeting -- a new policy, something of interest to everyone -- but I've had a few "copy desk social hours" where the goal is just to get people to meet each other and discover mutual interests.