A Managing Editor’s Perspective on Recruiting and Training a Managing Editor

Five years ago, Mark Dyken, editor-in-chief of Stroke, hired me as managing editor. He and his advisors considered me to be the strongest applicant on the basis of the criteria outlined in his portion of this Dialogue. Although I had no experience whatsoever with peer-reviewed journals, the other applicants shared this flaw.

My first assignment was to establish a new editorial office for Stroke in Indianapolis. Fortunately, the structure for American Heart Association (AHA) journals provides for publishing details to be handled from the National Center in Dallas. AHA editorial offices are primarily concerned with the review and acceptance process and editorial policy.

As part of my training, I traveled to Pittsburgh to spend a day with the outgoing managing editor. Only then did I learn that peer-reviewed journals are radically different from every other publication I had produced. My prior experience included producing a health magazine for a large medical center and serving as an administrative aide for a mayor. I had also held other medical publications jobs and had earned a BS in business journalism with an emphasis on management. The publications and administrative experience had helped me to win my new job, but clearly I would be performing tasks far different from those I had already performed or even imagined. Instead of writing and editing articles as I had envisioned, I was, of course, expected to set up a highly efficient editorial office that could rapidly receive, document, and process scientific manuscripts through a detailed review process. The primary tangible fruit of my labor would be letters to authors and reviewers, mountains and mountains of letters. (See the table for an estimate of the letters produced in the Stroke editorial office in 1 year.)

The first year was trial by fire. As is typical for editorial office relocations, when I arrived in the office, I had no computer, no staff members, no supplies, and a temporary office just big enough for a small desk and a fax machine. But I did have a stack of manuscripts that needed to be sent to reviewers! I immediately realized that though my office lacked essentials such as personnel and equipment, I needed to process manuscripts myself while I hired an office staff and set up a functional office.

During that first 6 months, I nearly always worked 7 days a week, taking work home every weekend and many evenings. The first year was, to say the least, highly stressful, and my most challenging work experience. However, I was luckier than many new managing editors because I could call the former Stroke managing editor and staff members at the AHA for advice when needed.

From my contacts with other managing editors, I know that the first year is typically a nightmare, especially for managing editors of journals that relocate to another city and editor. If the new managing editor has no prior peer-reviewed journal experience, the learning curve is breathtakingly steep, and the relentless deluge of manuscripts does not allow the needed "down time" for training and organization.

Recruiting

Five years later, Dyken is satisfied with the performance of the Stroke office. I too am pleased that I have been able to meet the challenges of running an editorial office. But remembering those first stressful months, I would suggest revising 2 key criteria for recruiting a managing editor. To track manuscripts, authors, and reviewers adequately and to keep manuscripts "moving along" in the review process, I believe database expertise is essential. Database expertise is also

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Letters produced by the Stroke editorial office in 1 year

<table>
<thead>
<tr>
<th>Types of letters</th>
<th>Nr of letters</th>
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<tbody>
<tr>
<td><strong>To authors</strong></td>
<td></td>
</tr>
<tr>
<td>Acknowledgment letters for new submissions</td>
<td>1059</td>
</tr>
<tr>
<td>1st decision letters: revise, reject, or (rarely) accept</td>
<td>1059</td>
</tr>
<tr>
<td>Miscellaneous letters—2nd and 3rd revision letters, special problems, etc</td>
<td>150</td>
</tr>
<tr>
<td>Acceptance letters (based on 40% acceptance rate)</td>
<td>423</td>
</tr>
<tr>
<td><strong>To reviewers</strong></td>
<td></td>
</tr>
<tr>
<td>1st review cover letters (at least 2 reviewers per manuscript, often more)</td>
<td>2168</td>
</tr>
<tr>
<td>Review requests (It is not unusual to contact 5 or more people to secure 2 reviewers for a manuscript.)</td>
<td>4336</td>
</tr>
<tr>
<td>Reminder letters for late reviews</td>
<td>500</td>
</tr>
<tr>
<td>2nd and 3rd review cover letters</td>
<td>700</td>
</tr>
<tr>
<td>Thank you/review-exchange letters</td>
<td>2168</td>
</tr>
<tr>
<td><strong>To publisher</strong></td>
<td></td>
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<tr>
<td>Transmittal notes for accepted manuscripts—1 per manuscript</td>
<td>423</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>12,986</td>
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*This table shows estimated numbers of letters staff members produced in 1995, based on 1059 submissions received by Stroke that year. Many letters accompany complicated information packages for the recipients. For example, letters recommending revisions to authors are accompanied by the reviews, instructions for revisions, instructions for diskettes, a copyright-transfer agreement, and a sheet with questions for the authors.*
vital for developing efficient mailmerge routines for correspondence. I would therefore emphasize database expertise as one of the minimum requirements and rank prior peer-reviewed journal experience as a high priority. These 2 criteria would have disqualified virtually every applicant that applied in 1991—including me! These criteria were included, but not emphasized, in the job description developed by the AHA that is included in Dyken’s companion article. Database experience is tremendously more common now than it was 5 years ago and should be an absolute requirement. However, applicants with journal office experience are still frequently not readily available in many areas, and this experience cannot be an absolute necessity.

Assessing the Applicants
In addition to journal-office experience and database expertise, the following criteria need to be assessed:

- **Administrative abilities**
- **Supervisory skills**
- **Writing skill:** Proof of this should be easy. Read the applicant’s portfolio.
- **Ability to type:** I have known 1 excellent managing editor who could not type. However, since publications professionals must be able to produce lucid copy and business letters quickly, this qualification is important.
- **Computer literacy:** High-level word-processing and database skills are crucial. Knowledge of spreadsheet software is important.
- **A strong work ethic:** High motivation; willingness to work long hours.
- **Publications experience:** Familiarity with the entire publications process—from writing through copyediting, authors’ proofs to distribution.
- **Staying power:** Reject applicants with a steady history of job hopping. Ask applicants for a reasonably long commitment if hired.
- **Evidence of self-discipline:** Particularly in academics. A love of academia and top grades are good signs.

- **General qualities:** Good character, maturity, attention to detail, sense of humor, flexibility, tact, an insistence on quality work, respect for the scientific community and the medical profession.

Questions for Interviewers
To simplify the interviewing process, Vicki Sullivan, director of AHA Scientific Publishing, who has helped many new editors recruit managing editors, developed the following 4 key questions for interviewers:

- **Tell me about your publication production experience.**
- **Tell me about the biggest project you ever managed.**
- **Tell me about your computer skills, especially as they relate to project management, system development, and database skills.**
- **Tell me about your supervisory experience.**

Note that the open-ended nature of these 4 questions encourages applicants to talk about themselves and their experience. This provides interviewers with more information and gives them a chance to evaluate communication and analytical skills.

Training
Once a new managing editor is hired, the 2nd hurdle is training. Even if the managing editor has worked in a journal office, journals and editors-in-chief differ widely. Each journal has its own set of priorities and procedures. Because of this, the outgoing managing editor is effective, she or he is almost always the best person to train the successor. However, she or he may be many miles away from the new office and engrossed with the tasks involved in closing the old office and finding another job. Nevertheless, adequate time to train the established office is vital. One key to addressing this problem is to start early. Ample transition time will allow for sufficient training and time to close the old office and set up the new office step by step, with a gradual transfer of responsibilities. Three months is barely enough time. Six months is probably adequate for a journal the size of *Stroke*, which receives about 1000 submissions per year. Costs can be conserved if the new office is gradually hiring staff and gearing up while the old office is gradually releasing staff and transferring equipment.

During training, the managing editor should be given an opportunity to work with each staff member and learn every procedure in the outgoing office. Minimal training time in the outgoing office is probably 2 weeks and ideal time would be a month. Unfortunately, even 2 weeks for out-of-town training may be impossible for some people. The CBE Short Course for Journal Editors does an excellent job of covering the basics. However, since it is only offered annually, many new managing editors are unable to take this course until they have already been on the job for many months. I myself took the course in May 1992, but I had been hired the previous November. The course would have been much more helpful if I had been able to take it earlier.

If the outgoing managing editor is absolutely unable to train the new one, the editor could hire a consultant or request help from managing editors of other journals. If an association sponsors the journal and produces other journals in the fashion of the AHA, which produces 5 journals, it may be relatively easy to arrange for another managing editor to train and mentor the newcomer.

Another valuable training aid is an office procedures manual that describes step-by-step procedures for routine tasks. Obviously, such a book is highly journal specific and must be developed by each individual office, but once created, it serves as a valuable reference for new staff members.

Illumination of the Obvious
One purpose of analysis is the illumination of the obvious. Although this list is specific for *Stroke* and will vary among journals, allow me to list the very obvious procedures a managing editor needs to learn thoroughly during training. This list of tasks would be much longer for a managing editor whose
Responsibilities include copyediting and production of a printed or electronic product. At the very least, the new person needs to learn how to:

- Check manuscripts for completeness.
- Log in manuscripts in the database.
- Obtain reviewer assignments from editors.
- Send "requests to review" to reviewers.
- Assemble packages for 1st and subsequent reviews.
- Chase after late reviews.
- Log in reviews.
- Prepare draft letters to authors after reviews are received.
- Assemble manuscript packages to send to authors for revisions. (For *Stroke*, the requests for revision can be quite complicated. The editorial office checks manuscripts for a long list of requirements and alerts authors when there are shortcomings.)
- Check that revised manuscripts meet the requirements.
- Send decision letters to authors.
- Use mailmerge to generate batches of every type of letter. See the table for a list of standard letters produced in the editorial office.
- Use all editorial office equipment such as fax machines, scanners, and modems.
- Coordinate the work of the editorial office with the publisher.
- Create reports and compile statistics such as submission reports and acceptance rates.
- Quickly pinpoint manuscripts that may need special attention.
- Check the work of every staff member in the office for errors.
- Coordinate with other university departments, especially the mail, purchasing, computer support, and personnel departments.

The managing editor also needs to understand:

- Editorial policy;
- Intricacies of the database and other software used in the office;
- Details of the editor-in-chief's job.

Once new staff members are hired, the managing editor obviously will be able to delegate many of these tasks. However, she or he needs to understand every procedure thoroughly in order to train and supervise effectively.

**Need for Journal-Personnel Pool**

As far as I know, the only way an editor or search committee might easily reach adequate numbers of applicants with journal-office experience is to advertise in *CBE Views*. Since *CBE Views* is published bimonthly, the delay may be long between publication of the ad and receipt of any responses.

One solution that would be extremely helpful to new editors-in-chief would be for *CBE* to establish a journal-personnel pool. Individuals with journal experience who are seeking work as regular staff members or as consultants could register for this pool, complete questionnaires, and submit resumes. Answers to questionnaires could be compiled in a database, and editors could then request database printouts meeting their criteria along with resumes. Consultants could be included in the database so that editors can locate experienced people willing to train and mentor a new managing editor if other resources are unavailable.

**A Wish for the Future**

New managing editors have a formidable task. I wish them well and hope that their jobs will be made easier by editors and associations who recognize the need for training, plenty of support and mentoring, and adequate time for office transitions.

Marilyn Yurk
Managing Editor, *Stroke*

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**Recommendations for Recruiting and Training a Managing Editor**

We offer the following recommendations, developed especially for journals that change editors and relocate:

1. The Council of Biology Editors should consider establishing a pool of journal-staff personnel for people who are interested in journal-staff positions or consulting opportunities. Journal openings and information about consultants and job seekers could be listed on the CBE Website and updated weekly.
2. Editors should make a strong effort to hire managing editors with previous peer-reviewed journal experience.
3. New managing editors should have the opportunity to train at least 2 to 4 weeks in the established editorial office.
4. Every journal should prepare an operations manual outlining the steps involved in each routine task. These manuals are valuable for existing and new employees and invaluable during office transitions.
5. Editors should consider hiring a consultant, such as the outgoing managing editor or a managing editor from a similar peer-reviewed journal, to help recruit new managing editors and ease office transitions. The consultant should stay in close contact with the managing editor during the 1st year.
6. Editors should define the functions of the managing editor and the editorial office clearly and share these descriptions with applicants. The AHA managing-editor job description could be used as a model.
7. Associations and editors should develop a transition plan allowing plenty of time for office transition and training (6 months for a journal that receives approximately 1000 manuscripts a year). To control costs, the outgoing office could gradually transfer responsibilities and reduce staff as the new office adds staff and equipment.

Mark L Dyken and Marilyn Yurk