Planning and performing terminology projects in SADC countries

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Introduction

- Terminology is a strategic resource and has an important role in a country – especially in a multilingual country.

- Effective scientific and technical communication skills of the citizens of a country are developed through the use of correct terminology.

- Although terminological and terminographical activities are not always cost-effective, they are of invaluable cultural, social, historical, functional, academic and scientific importance.

Terminology management includes a variety of separate but related issues:

- **Planning of terminology projects**
  - Business plan
- **Training**
- **Terminology Management**
- **Performing terminology projects**
  - Terminography process
- **Dealing with copyright issues**
- **Language Policy and Planning**
  - Standardisation
  - Cooperation

Planning

- The compilation of a dictionary is a time-consuming and costly process
- Proper planning is of the utmost importance whether the project is done by an individual, a team of subject specialists and terminologists, or a terminology office
- A business plan is the ideal tool for proper planning of a project
- It gives an indication of the scope of the project
- Financiers require a business plan to authorise the financing of a project

Planning (cont.)

- A **business plan** should be preceded by *strategic planning* and should contain full details of the *envisaged outcomes*

- The development of a **business plan** is important since it:
  - forces the team to think logical
  - assists with the identifying and formulating of objectives
  - develops strategies to meet those objectives
  - creates structure by defining activities and responsibilities
  - simulates reality and anticipates problems
  - serves as a working action plan
  - forms the basis to obtain financial assistance
  - aids in selling the envisaged end-product to a potential publisher

Business plan

- A business plan is a detailed action plan or road map outlining every conceivable aspect of the proposed terminology project.
- It is a structured guideline to achieve goals
- It is a comprehensive, self-explanatory plan of
  - **what** you intend doing
  - **how** you intend doing it
  - **when** you intend doing it
  - **where** you intend doing it, and
  - **why** you believe the idea is viable

Business plan (cont.)

- The main purpose of a business plan is to indicate proper planning

- A business plan is a financial tool

- There is no fixed format – format depends on:
  - the nature of an endeavour
  - the nature of the institution doing the project
  - the needs of stakeholders and target users

- Guidelines given should be adopted to suit the project's unique circumstances

Business plan (cont.)

■ Why do you need a business plan?

- Sourcing financial assistance
- Assessing the feasibility of the project
- Testing new ideas
- Taking cognisance of envisaged problems
- Determining need for human resources
- Determining technological needs
- Managing the terminographical process (strategic plan)

Business plan (cont.)

- **When do you need a business plan?**
  - The business plan is the basis of the financial application and the main tool for communicating your ideas to
    - the providers of funding
    - partners or publishers to invest time and money
- **Who has to compile the business plan?**
  - The project manager (person who will have the operational responsibility)
  - The project manager should be assisted by a project team
  - Finance experts should assist with the financial planning

Business plan (cont.)

- How do you compile a business plan?

- A good business plan covers the following key areas:
  - People
  - Opportunity
  - Context
  - Risk and reward

Business Plan (cont.)

- **People**
  - Where to obtain human resources (subject specialists and terminologists)?
  - What experience do they have relevant to the project?
  - What expertise, skills, knowledge, abilities do they have?
  - Is training needed?
  - How committed are they to the project?
  - How realistic are they about the project's chances of success and the problems they will face during the process?
  - Who are the end-users? Learners, students, subject community, language practitioners, general public?
  - Who are the stakeholders and collaborators?

Business Plan (cont.)

- **Opportunity**
- The profile of the project, what it would produce and to whom (target users), whether it would succeed, what the economics are and who and what stands in the way of success
- Mission, vision and goal statement
- Situation analysis (present situation and critical factors)
- Outline of intended strategies to obtain envisaged goal
- Organisational structure
- Key variables and objectives
- Critical success factors
- Key uncertainties
- Action plan and envisaged milestones
- Human resources management (terminologists and subject specialists)
- Target group
- Technological resources (Terminology Management System)
- Costs to produce, deliver and publish

Business Plan (cont.)

■ Context

■ This relates to the regular environment, interest rates, demographic trends, political influences (e.g. language policy), inflation, etc. – factors that change but cannot be controlled by the terminographer:

- ■ Would the macro and market environment hinder or promote the project?

- ■ Would changes in the terminographical environment impact on the project?

- ■ What could be done should the context become unfavourable?

Business plan (cont.)

- **Risk and reward**
  - An assessment of everything that could fail (*risk*) or succeed (*reward*)
  - An outline of response by project team
    - Discuss risk(s)
    - Discuss management of risk(s)
    - Discuss what rewards the project would deliver, to whom, and when
    - Discuss quality and quantity of reward(s)

Business Plan (cont.)

Financial planning and forecasts

- It is difficult to prepare a comprehensive outline of a financial plan and strategy
- The essence lies in converting the operational activities into monetary figures
- Compile
  - estimate budget,
  - balance sheet,
  - income statements,
  - cash flow statements,
  - and expenditure reports
- A business plan can provide proof of proper planning

Training

- There is an urgent need for terminology modules at university level (undergraduate as well as postgraduate courses)
- In-house training is needed to equip new employees
- The basic principles and practice underpinning terminology and terminography should be included in all courses
- Training models need to be revised regularly in order to keep abreast of the changing needs of trainees and students
- New terminology applications should be included in courses

Terminology management

- The **mission** of a ***national terminology office*** is *inter alia* to assist with the development and modernisation of the terminology of all official or natural (indigenous) languages of a country.

- The **aim** is to promote, in the interest of the community, scientific and technical communication by rendering a terminological and terminographical service on behalf of and for the use of the relevant language groups.

Terminology management (cont.)

- The **objectives** are to support the reigning government in the formulation, planning, development, implementation, maintenance and management of **national policy** and **strategies** concerning technical languages (*language for special purposes*) in order to promote communication and to develop official and/or natural languages into functional languages to be used in all spheres of life.

Terminology Management (cont.)

- A national terminology office should
  - render a terminology service by way of conceptualisation, creation, documentation and standardisation of terminologies;
  - develop structures and facilities to meet the requirements of the indigenous language communities;
  - facilitate and coordinate terminology development;
  - develop, manage and maintain a computerised information-oriented terminological database (terminology management system (TMS));
  - disseminate terminological information.

Terminology Management (cont.)

- A national terminology office has the infrastructure and resources to execute its task.

- Language practitioners are appointed to serve the official or natural (indigenous) languages.

- Terminologists and terminographers perform a specialised service when recording terms and compiling dictionaries.

- Terminology is managed by means of computer-based programs

- A terminology service is provided to subject and language communities

Terminology Management (cont.)

- Terminology management progressed from recordings on **index cards** to **computer based programs** and **sophisticated conversion environments** designed to move terminological data effortlessly between computer platforms, applications and methodological environments.

- The production of **simple term lists** to assist *translators* and *subject specialists* gave way to the **systematic documentation of concept-oriented terminologies** for use by *human translators*, for use in *standardised localisation environments* and *machine translation*.

Terminology management (cont.)

- **A (national) terminology office deals with a variety of aspects concerning terminology work:**
  - Dictionary compilation: terminology and terminography
  - Research
    - micro (i.e. conceptual framework; terms)
    - macro (needs assessment and feasibility studies)
  - In-house training
  - Liaison with linguists, language practitioners
  - Liaison with subject specialists, stakeholders
  - Facilitation and rendering of a terminology enquiry service
  - Managing of a Terminology Management System (TMS)

Terminology Management: Work flow

Types of requests to a national terminology office:

- The office receives a special **request** from an **external body** (i.e. client, institution, government department or other user of terminology) for a *terminology list* or *technical dictionary* in a specific subject field.

- The office conducts an **internal needs assessment study** to identify terminology needs in various disciplines, subject areas or domains **(proactive)**

- The office conducts a **needs assessment study** in **collaboration** with various stakeholders and identifies terminology needs in a specific discipline, subject area or domain.

Work flow (cont.)

- Terminology management (head of office and section heads) should
  - discuss the project in depth;
  - compare it with priorities determined by the latest needs assessment study;
  - approve, outsource or reject the project;
  - if approved, the section heads (terminography and terminology) should indicate whether they will be able to:
    - meet the requirements;
    - meet the deadlines.

Work Flow (cont.)

- Head of the office refers the request to a project coordinator who will:
  - Liaise with the <u>client</u> in collaboration with an <u>appointed project leader.</u>
  - Determine whether a <u>similar project</u> is running somewhere else and contact the project team to establish a working relationship if so.
  - If not, <u>register the project.</u>
  - Write a report on the <u>feasibility</u> of the project.
  - Compile a <u>business plan.</u>

Work flow (cont.)

■ Compile a business plan
- ■ Mission statement
- ■ Situation analysis
- ■ Critical success factors
- ■ Goals
- ■ Strategies
- ■ Key uncertainties
- ■ Organisational structure (human resources)
- ■ Financial issues
- ■ Facilities (office space, IT equipment)

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Work flow (cont.)

- Terminography section (*subject related*)
  - Determine Source Language (SL)
  - Excerpt terms from documentation related to subject area, domain or discipline
  - Document relevant terminographical information (TMS)
  - Supply definitions and relevant information
  - Consult SL subject specialists
  - Consult SL linguists, SL language practitioners
  - Conduct subject committee meetings
  - Finalise SL terminology (TMS)

Work flow (cont.)

- Terminology Section (*language related*)
  - Determine target language(s) according to policy of country (national project) or specific needs of client
  - Supply term equivalents and definitions in target language(s)) - terminology research
  - Record the terminological information (TMS)
  - Consult with TL(s) subject specialists
  - Consult with TL(s) linguists, language practitioners
  - Conduct subject committee meetings (TL(s))
  - Finalise TL(s) terminological information (TMS)

Work flow (cont.)

- When the SL and TL(s) are finalised the terminology list/dictionary should be verified and authenticated by language experts (e.g. in South Africa: PanSALB's National Language Bodies) to ensure buy-in from the language communities.

- After verification and authentication adjustments should be made to the text.

- Then the term list/dictionary can be printed.

- Where a TMS is being utilised no proofreading is necessary – if not the manuscript should be proofread.

- The final term list/dictionary (SL + TL(s) is submitted to the client for dissemination.

Copyright

- Copyright is a issue to be taken seriously.

- The dictionary remains the intellectual property of the compiler (creator of the dictionary product).

- Definitions, contextual information and other material copied from sources should be cited properly.

- The high degree of originality involved in collating and linking information in databases usually qualifies the terminological material to be original works.

- The names of all the terminologists, contributors, collaborators should be mentioned in the dictionary.

Language Policy and Planning

- The language policy of a country determines how many languages should be included in a dictionary
  - Eastern Africa: Kiswahili
  - Namibia: One official language, 16 national languages
  - South Africa: 11 official languages
- Language policy would also determine the drive to harmonise terminology of related languages
- Each language community will also determine the acceptance of foreign neologisms, transliterations and borrowings into the language

Standardisation

- There are efforts within ISO TC 37 and other standardising bodies to standardise terminology
  - Consistent standards
  - Advisory standards outlining viable terminology management practices
  - Terminology interchange format for different applications (language practitioners, machine translation, etc.)
- Each subject and language community will standardise its terminology by the frequent usage thereof.

Cooperation and liaison

- Subject specialists
- Language practitioners (terminologists, terminographers, lexicographers, translators, editors, interpreters, journalists, etc.)
- Academics (linguistics and disciplines)
- South Africa: National Language Bodies
- Terminology related organisations (Infoterm, TermNet, WBIT, DanTerm, European Union, etc.)
- Standardising bodies (ISO TC37, StanSA TC37, etc.)

Conclusion

- A national terminology office serves the whole country.

- It should adhere to sound terminographical and terminological principles and procedures.

- Terminology work is team work. A terminology office does not work in isolation.

- Terminology should be recorded in a TMS.

- The terminology practice of any country will enhance communication in various subject fields and will develop official (and national) languages into functional languages.

THANK YOU!

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