

ADDITIONAL EDITING SERVICES

Tick any additional editing required

- Commission/acquire/select/research information for publication (including picture research).
- Assess manuscript and provide advice to author(s)/publisher on suitability for publication.
- Provide editorial input to document format and design process.
- Substantially rewrite and/or condense text.
- Write blurb.
- Desktop publishing:
 - Lay out and assemble document.
 - Edit on screen and incorporate other changes.
 - Produce camera-ready copy.
- Prepare index.
- Assemble list of references.
- Assemble glossary, list of abbreviations or other listings.
- Obtain library classification information (ISBN, ISSN, CIP data).
- Check blues/dyelines and colour separations/chemical proofs.
- Check advance copies for print and finishing quality.

Guidelines for members on editing tertiary level work for assessment

Editors should be aware of the potential for ethical problems in editing theses, essays or other work to be submitted by undergraduate or postgraduate scholars to universities or other tertiary institutions. The Society recommends that, before accepting such work, the editor discusses with the scholar the department's view on editing, and suggests that it may be desirable to obtain formal departmental approval. The scholar should be asked to acknowledge in the work that it has been edited.

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PROJECT MANAGEMENT

Tick any management services required:

Assembly of publications team

- Identify and engage appropriate editors, designers, illustrators, photographers, word processor operators, typesetters, colour separators and printers.
- Negotiate prices and schedules with subcontractors.

Planning and scheduling

- Establish reporting process.
- Ensure appropriate equipment, materials and facilities are available.
- Estimate budget and time required for completion of each element—text, illustrations, captions, design, layout, review, corrections, artwork, printing, delivery.
- Establish accounting procedures.
- Plan network and schedule for all inputs.

Coordination and management

- Brief team members on their required inputs.
- Coordinate tasks, monitor progress against budget and schedule, and provide project status reports.
- Provide team liaison and information flow.
- Identify and manage any required variations to the agreed scope of services, budget or schedule.
- Organise delivery and distribution of finished publication.

Quality control

- Establish quality standards.
- Monitor or supervise quality procedures and review processes aimed at ensuring that editing, design, illustrations and printing meet specifications and agreed standards.
- 'Field test' draft on sample audience.
- Train other team members or in-house office staff.



Commissioning Checklist

P R O J E C T D E F I N I T I O N

Ensure agreement is reached on the following issues (where relevant) before commencing editing work

Define purpose of publication

Readership

Assumed knowledge
Expectations (style of presentation and conventions)
Appropriate written style and vocabulary

Function

Objectives of publication
Manner in which it will be used
Content, length and structure
Document organisation to aid access to information (summary, recommendations, table of contents, index, headings, appendixes, numbering system, tabs)
Illustrations (photographs, maps, tables, diagrams, other)
Style and format (size, typography, page layout, colour, cover, binding)
Print run

Make preliminary assessment of manuscript

Evaluate requirements, based preferably on brief appraisal of complete manuscript

Determine required quality of finished product, and consequent:

- Extent of editorial and design involvement
- Quality of illustrations and printing

Identify constraints

Budget
Timetable
Quality of manuscript
Legal requirements
Format requirements
External inputs:

- Authors
- Other team members
- Other material or permissions to be acquired
- Review/approval process
- Printing and production

Negotiate tasks and responsibilities against these constraints

Define the agreed scope of tasks

Core editing tasks (see pp.2–3)
Any additional editing services to be provided (see p.4)
Any management role required of editor (see p.4)

Allocate responsibility, authority and accountability for the following areas, ensuring that expectations are achievable

Quality control and team performance
Budget
Schedule

Agree on schedule for:

Authors
Illustrations and photography
Other pre-editing inputs
Editing
Word processing
Design and layout
Reviews/approvals
Proofing/mark-up
Artwork, colour separation
Printing
Delivery

Agree on budget for:

Editing
Any additional editing and project management services to be provided by editor
Other production costs to be negotiated and controlled by editor (e.g. subcontractors, equipment, expenses, materials, printing, distribution)

Formalise agreement or draw up contract

Define brief
Set out assumptions
Document levels of responsibility, authority and accountability
Determine procedures for variations

L E V E L S O F E D I T

Agree on services to be provided and tick relevant boxes. A comprehensive edit requires all three levels listed below.

Selecting the appropriate level of service

The core editing tasks likely to be required on a manuscript can be grouped into the following three levels of edit (in descending order of complexity):

- **substantive edit**, which aims to ensure that the structure, content, language and style of the document are appropriate to its intended function and readership;
- **copy edit**, which is a more superficial check of language and style, to confirm that the meaning is clear, that it is acceptably expressed, and that the content is consistent (both textually and visually). Although a copy edit will seek to improve and clarify text where obviously necessary, it involves neither significant rewording, nor provision of a single authorial voice, nor tailoring of text to a specific audience (all of which are properly the province of a substantive edit);
- **verification edit**, which involves checking that all elements of the document are included and in the proper order, all amendments have been inserted, the house or other set style has been followed, any spelling or punctuation errors have been deleted, the format and layout are consistent, and the document is ready to be printed.

Each of these levels of edit may be performed as a separate service, and various elements of a verification edit may need to be carried out repeatedly at different stages of document development.

However, all three levels of edit must be undertaken on a single document before it can be considered to have had a **comprehensive edit**.

SUBSTANTIVE EDIT

- Structural review**
Assess conceptual integrity, and whether additional material or reader aids (such as illustrative material, glossary or index) are required.

Check whether document fulfils intended objectives.

Identify whether any major rewriting is required and, if so, agree on who is to do this.

Determine whether any rearrangement, expansion or summarising of sections is required to achieve the most logical structure, and whether any material should be relegated to an appendix or vice versa. If so, agree on who is to do this.
- Language and style editing**
Ensure language and form are appropriate to readership.

Ensure there is a logical flow and appropriate weighting of discussion.

Ensure information and arguments are presented clearly and unambiguously.

Delete any unnecessary repetition, as well as redundancies, contradictions and irrelevant material.

Where appropriate—for example in multi-author works—provide consistency in style and tone.
- Clarity of presentation**
Check presentation is simple and effective.

Ensure document title and all headings accurately reflect contents.

Check appropriateness, placement and clarity of tables, figures and other illustrative material.

Check material in tables and figures against textual references and for accuracy where required.

Ensure appropriate referencing is included.

Wherever necessary, ensure explanations of symbols, abbreviations and terms are incorporated in text or glossary.

COPY EDIT

- Incorporation of changes by author(s)/reviewer(s)**
- Appropriate use of language**
Grammar
Syntax
Spelling
Punctuation
Clarity of expression
- Consistency**
Language consistency: establish consistent and appropriate approach in terms of language and structural parallelism, terms used, spelling, capitalisation, hyphenation, abbreviations, expression of numbers and quantitative data, and references. Alternatively, follow a house style covering these elements.

Visual consistency: establish consistent and appropriate format in terms of typography, heading hierarchy, page layout, figures, tables and captions. Alternatively, follow a house style covering these elements.
- References**
Check accuracy of cross-references within text, between text and figures, and between lists of contents and body of document.

Check conformity and completeness in textual and bibliographic references and quotations.

Check sources have been acknowledged and any copyright holders' stipulations have been followed.
- Resolution of queries and review of editing approach with author(s)/publisher**
Check conformity with publisher's style. If no house style has been set, the editor, in consultation with the client, should adopt or devise a system that is internally consistent and in line with accepted practice.

VERIFICATION EDIT

- Verification of copy**
Check against previous copy for discrepancies.

Check that all amendments have been accurately inserted.
- Integrity check**
Check that document is complete, including (as appropriate):
 - preliminary matter (cover, dust-jacket material, spine copy, preliminary pages, copyright and publication information)
 - body of document (abstract/summary, text, tables, illustrative material, labels and captions, footnotes and endnotes)
 - end matter (appendixes, lists of abbreviations and symbols, glossary, references/bibliography, index).
Check headings, pagination, figures and tables against lists of contents.
- Proofing**
Check for spelling, typographical or punctuation errors, appropriate wordbreaks at ends of lines, and accurate cross-referencing.
- Conformity with house style**
Ensure consistency in:
 - terminology, spelling, hyphenation, capitalisation, abbreviations and acronyms, italics
 - heading hierarchies
 - style of numbers, dates, percentages, symbols, equations.
Check type specifications.

Check page layout.
- Format**
Eliminate any widows, orphans or rivers.

Check that tables are not split unnecessarily, and that alignment, spacing and bolding are correct.

Note any necessary directions for typesetter and printer.