

Professional Editorial Standards

ADOPTED by the association's membership in 1991 and revised in 1999, these Standards list the skills and knowledge needed for editing in English-language media in Canada. The full text of *Professional Editorial Standards* is reproduced below.

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Introduction

Editor: "he that revises or prepares any work for publication."
(Samuel Johnson, *A Dictionary of the English Language*, 1755)

Editing is both an art and a craft. It may call variously for inspiration, patience, an infinite capacity for detail -- or a measure of each. Serving the requirements of the publisher, the writer, and the reader demands self-confidence and tact -- and humility. It also requires a variety of skills. Given this variety, no one can specify what makes a great performance in every activity that is called editing. One can, however, specify the skills generally accepted as needed by editors working in particular media.

The skills listed in this publication are those most commonly required for editing English-language text, whether on paper or on screen. The editor's functions start when the writer declares the manuscript more or less complete and continue through to the point at which it is ready for publication, regardless of the medium. Editors perform many tasks along the way, including structural editing, stylistic editing, copy editing, markup/coding, and proofreading. The technologies used in editing and in publishing change, but the fundamental tasks and the editorial skills required to work with words remain relatively constant.

Most editors have particular kinds of expertise, but to do a competent job in any of the areas mentioned above, every editor needs some skills in all of them. All editors also need some knowledge of the publishing process, including an elementary understanding of design conventions and the technology of production, and some common-sense skills for interacting with writers, with other editors, with reviewers, and with designers, keyboard operators, printers, and others working on the same publication. Finally, they must recognize when they need to supplement their knowledge and skills; for example, although few may have mastered every point in the following pages, all editors must know when and how to use reference books and other resources to find the information they need.

The editor who meets the standards given here is competent to turn in an acceptable job with a minimum of supervision.

For convenience, the requisite skills are divided into four groups, despite some inherent overlap:

- Structural and stylistic editing

- Copy editing
- Proofreading of first proofs and checking subsequent stages of production
- Elementary knowledge of the publishing process

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A. Standards for Structural and Stylistic Editing

A competent structural and stylistic editor should be able to

1. Recognize structure appropriate for the intended audience and medium. Suggest deletions, additions, or rearrangements if appropriate (e.g., where there are gaps in content, missing steps in the argument, unclear transitions).
2. Create an outline to reveal structure.
3. Reorganize material into an appropriate (e.g., logical or entertaining) structure and sequence, keeping in mind that the nature of the publication often determines organization (e.g., an academic article and a newspaper story differ in structure, as do a book and a Web site).
4. Recognize when prose material would be better presented in another form (e.g., number-laden text as a table or chart, descriptive material as a diagram or illustration, a long series of points as a list).
5. Recognize language appropriate for the intended audience and medium, and make changes as necessary.
6. Establish a consistent style, reading level, point of view, and level of decorum, while maintaining a voice that is recognizably the author's.
7. Enhance, or at least preserve, appropriate stylistic and dramatic devices (and minimize inappropriate ones).
8. Recognize and clarify ambiguous vocabulary and syntax.
9. Recognize and eliminate redundancies and verbosity.
10. Recognize and eliminate jargon that is inappropriate for the intended audience.
11. Correct or improve infelicitous connections and transitions, parallels, and paragraphing.
12. Recognize and correct inconsistencies in the form and use of headings (e.g., inappropriate level, nonparallel forms).
13. Maintain consistent style in headings and in captions for tables, figures, and illustrations.
14. Recognize statements that should be checked for accuracy, and follow up as required.
15. Identify inconsistencies in logic, facts, and details such as time, nomenclature, or setting, and correct or query as required.
16. Write coherent and diplomatic notes to authors explaining changes or asking for clarification, and negotiate such changes.
17. Identify, in language and in content, possible legal trouble spots (e.g., libel, plagiarism, missing permissions) or departures from social acceptability (e.g., gender, ethnicity, or age bias; failure to give sources).
18. Revise or cut to meet length requirements.

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B. Standards for Copy Editing

A competent copy editor should be able to

1. Identify and correct errors in spelling, usage, grammar, punctuation, and style.
2. Ensure that sources are acknowledged in a form appropriate to the publication.
3. In both text and art, check facts that fall within the realm of general knowledge; ascertain the mathematical accuracy of numerical material; and ensure internal consistency.
4. Establish and maintain accuracy and consistency in the handling and styling of heads and subheads, tables, figures, captions, and lists.
5. Treat non-English (especially French) terms and place names appropriately within English text.
6. Use accepted symbols to mark copy for correction.
7. Develop a style sheet; follow one that is provided.
8. Negotiate copy-editing changes to the manuscript tactfully, and ensure that those and subsequent revisions do not create further problems.

For all of these tasks, the editor should be familiar with major style guides, dictionaries, and general reference works, and know when to use them.

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Following are expansions of several of the points above:

1a. Spelling

i. Consistently recognize and correct

- commonly misspelled words (e.g., accommodate, recede, millennium, occurrence)
- tricky proper nouns (e.g., Colombia/Columbia, Ukrainian, Mulroney, Macdonald/McDonald)

ii. Establish consistency in the use of the hyphen, en dash, and solidus in compound structures.

iii. Understand variations among British, American, and Canadian styles (e.g., labour/labor, travelling/traveling, licence/license, organise/organize), and apply one that is appropriate for the intended audience.

1b. Diction

- i. Recognize and correct common mistakes in usage (e.g, misuse of enormity, gratuitously, comprise/compose, affect/effect, uninterested/disinterested).
- ii. Demonstrate an adequate vocabulary to substitute words that more accurately convey the author's intent, yet have sufficient sensitivity not to make unnecessary changes.
- iii. Recognize and avoid or amend empty verbiage, obfuscating jargon, sexism, racism, and other potentially offensive or pejorative language.
- iv. Maintain consistency in the level of language established by the author, required by the publisher, or both.

1c. Grammar and Syntax

Recognize and correct such common problems as

- dangling participles and misplaced modifiers
- unclear antecedents for pronouns
- lack of agreement between subject and verb
- confusion in tense, number, or case
- faulty parallelism
- weak sentence constructions
- confusion between restrictive and nonrestrictive constructions

1d. Punctuation

- i. Understand the principles governing the use of punctuation marks, including period, question mark, colon, semicolon, comma (serial and parenthetical), em and en dashes, hyphen, quotation marks (single and double, opening and closing), and ellipsis points.
- ii. Use the full range of punctuation marks to achieve clarity (e.g., in a complex series in which the items themselves include punctuation).
- iii. Apply punctuation principles consistently and sensibly in text, lists, tables, figures, captions, etc.
- iv. Understand the differences between North American and British punctuation, and apply either convention or a hybrid as appropriate for the intended audience.

1e. Mechanics

Establish and maintain consistent patterns within each manuscript for

- capitalization
- abbreviated and spelled-out forms and symbols
- arabic, spelled-out, and roman numerals
- dates, addresses, telephone numbers, Web addresses, and so on

2. Citations and References

i. Recognize when citations are needed.

ii. Apply current styles sensibly and without pedantry to bibliographies, in-text references, and footnotes/endnotes.

iii. Recognize when a citation or bibliography entry is missing necessary information, and obtain or request it.

iv. Recognize when permissions are required to use quotations, songs, photographs, illustrations, and other material, and obtain or request that the author obtain such permissions.

3. Numeracy

i. Recognize the peculiar pitfalls of text containing statistics, mathematics, or numerals, and know how to use decimals, fractions, percentages, and percentage points correctly.

ii. Perform metric/imperial conversions correctly and consistently, in appropriate units and to an appropriate degree of precision.

4. Tables, Art, and Figures

i. Detect common errors in tables (e.g., variations within row and column heads and presentation of data; mathematical inaccuracy of row and column totals).

ii. Check all art for consistency with text and with captions; check text for accurate references to illustrations, tables, figures, and their captions.

iii. Write accurate labels and informative and interesting captions when necessary.

6 and 7. Conventions and Tools of the Trade

i. Use common practices and apply industry/house conventions and preferences for

- the use of italics, roman, boldface, underlining, caps, and small caps

- metric versus imperial measurements
- spelling and punctuation styles
- abbreviations and symbols
- technical or trade terms

ii. Use accepted copy-editing and proofreading marks.

iii. Recognize the benefits and limitations of available software tools, such as search and replace, spell checkers, and grammar checkers, and correct errors that they overlook or introduce.

iv. Recognize how on-screen editing differs from hard-copy editing (e.g., types of editing errors, tracking editorial changes), and take steps in the process to ensure high editorial quality regardless of the procedure or tools used.

v. Given a spec sheet, a rough design, or sample pages, mark up a hard-copy manuscript for typesetting or word-processing, or insert codes directly into (or format) an on-line manuscript.

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C. Standards for Proofreading

A competent proofreader should be able to

1. Find and mark typographical errors, paying special attention to problematic areas such as proper names, numbers, and non-English terms.
2. Use standard proofreading marks, and know when and how to write out more detailed instructions to the typesetter or keyboard operator for the sake of clarity.
3. Distinguish between and mark differentially typesetter's errors and author's/editor's alterations.
4. Recognize the advantages and disadvantages of various proofreading strategies (e.g., reading with a partner; reading backwards; reading on screen or on hard copy).
5. Assess end-of-line word divisions and mark bad breaks for correction.
6. Read an editorial style sheet and ensure that it has been followed. If no style sheet is provided, prepare one as proofreading progresses.
7. Query, or correct if authorized to do so, editorial inconsistencies or errors in, for example, spelling, grammar, punctuation, or fact (including style and numbering of heads, citations, tables, figures, and illustrations). Use judgement about the degree to which such queries/corrections are called for, especially if working with electronic text, where copy-editing and proofreading tasks frequently merge.
8. Incorporate author's alterations, using judgement and tact.
9. Understand designer's specifications, and ensure that they have been followed throughout (e.g., by checking margins and cut sizes, alignments, type sizes and styles, line length and indents, leading, space around heads, weights of rules, use of colour).

10. Recognize widows, orphans, overly ragged edges, rivers of white space, and other typographical infelicities, and suggest adjustments in setting or wording to eliminate them.
11. Flag matters that will affect later stages of production (e.g., page cross-references and placement of art and inserts; alterations that will change page layout or indexing). If the work is to be produced in more than one medium (e.g., printed page and Web page), flag components, such as headlines and photographs, that need special handling.
12. Handle proofing stages after first proofs appropriately. For example, check alterations and the rest of type, including line breaks, throughout the changed portions but do not read the entire text; check all page breaks; check the consistency and accuracy of elements affected by text flow, including cross-references, running heads, folios, and nontext items; add "continued" lines where necessary; check or construct table of contents and permission acknowledgements.
13. Choose from among various options the changes that will prove the least costly or the most appropriate, given the production process being used and the desired quality of the publication.
14. Identify and correct the errors that result from the use of tools such as word processors, markup protocols, spell checkers, grammar checkers, optical scanners, and translation programs (e.g., garbled tables, the misinterpretation of special characters, extra spaces, inappropriate or missed line breaks, passages in the wrong typeface, substitution of a homonym for the intended word, confusion of arabic numeral 1 and lowercase letter l).
15. Judge what changes are appropriate to make (or suggest) at what stages for what kinds of publications: for example, in an advertising flyer, errors in descriptions and prices must be caught and corrected at any stage; in a novel, minor typographical errors are not corrected at vandykes/blueprints.

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D. Standards for Elementary Knowledge of the Publishing Process

An editor needs some general knowledge of publishing processes and specific knowledge of the production process being employed in the publication at hand. Thus, a competent editor should be familiar with

1. The necessity of establishing and meeting realistic schedules.
2. The conventional parts of a publication and their usual order and pagination.
3. The essential information that must appear in a periodical (date of issue, volume and issue numbers where applicable, publisher's name and address).
4. The requirements of copyright notice, trademark notice, CIP notice, ISBN, and ISSN.
5. The parts of a page -- margins, gutter, running heads, folio, text area.
6. What a print signature and an imposition are.
7. The historically significant processes of setting type -- hand composition, Monotype, Linotype, photo or laser composition.
8. The fonts of a specific typeface (roman, italic, bold, bold italic, small caps) and some uses of each.
9. The distinction between serif and sanserif typefaces, and appropriate uses of each.

10. The characteristics of a typeface: x-height, ascender, descender, em width, en width.
11. The distinction between justified and ragged setting.
12. The point/pica system for defining type size, leading, and line length, and how to interpret and write simple specifications for these elements.
13. Procedures for estimating the length of a manuscript (e.g., word count) and, given that information and a stated design, estimating the printed length of a publication.
14. For the publication at hand, the sequence of steps and the editorial tasks appropriate at each step. (This understanding should start with the original idea for the piece and end with the finished product.)
15. Procedures for ensuring that nontext items (e.g., photos, figures) appear in the correct position in the final publication.
16. Techniques for adapting nontext items (e.g., tables, illustrations, graphics) to fit a given space.
17. Procedures at each step in the production process to ensure that desired changes have been made and that previously approved material is unaltered.
18. The general effects of electronic and other technology on the publishing process, especially their influence on the role and responsibilities of the editor.

These Standards were written by the Committee on Professional Standards of the Freelance Editors' Association of Canada (now the Editors' Association of Canada), adopted by the membership on 27 April 1991, and revised by the committee in June 1999. They will continue to be reviewed regularly. Comments and suggestions should be addressed to

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