How do I brief an editor?

As a client or employer, you need to be clear about what you want an editor to do before you engage them.

What level of editing do you require?

Copy editing can be done at several levels but generally includes:

Image: pixabay

- ensuring a consistent approach to spelling, hyphenation, capitalisation, presentation of lists and tables, spacing, heading styles
- clarifying unclear terminology
- removing unnecessary abbreviations and colloquialisms
- correcting all grammatical errors and problems with word use
- highlighting/correcting confusing expression.

More intensive editing will:

- rewrite cumbersome sentences
- check facts or indicate inconsistencies
- review logical flow of text
- cross-check citations in text and reference lists etc.

This information was found at iped-editors.org/Find_an_editor/How_to_brief_an_editor.aspx

Formatting and assigning styles to text and headings also form part of the editing process.

Most editing is done onscreen but editing on hard copy may be required.

Levels of editing

The tasks that an editor performs can be grouped broadly into three levels: substantive editing, copyediting and proofreading. A comprehensive edit involves all three levels of edit.

Substantive editing (sometimes called structural or content editing) aims to ensure that the structure, content, language, style and presentation of the document are suitable for its intended purpose and readership.

Copyediting aims to achieve accuracy, clarity and consistency in a document. It does not involve significant rewriting, providing a single authorial voice, or tailoring text to a specific audience—these belong to a substantive edit.

Proofreading (usually called this, but sometimes known as verification editing) involves checking that the document is ready to be published. It includes making sure 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, and all spelling or punctuation errors have been deleted.

All of these levels of edit are essential in producing a high-quality publication, whether on paper or online. They are performed at different times in the publication process, and are not necessarily performed only once.

There is usually some overlap between the three levels and an editor hired to do a copyedit is quite likely to also perform some of the tasks usually associated with a substantive edit.

What skills must your editor have?

Editors range in their skill levels and areas of expertise and there are a number of tools to help you select the right one for your project.

The *Australian Standards for Editing Practice* (available through IPEd website) describe the range of services editors can provide.

In 2008 IPEd conducted the first Australian accreditation exam for editors. Successful candidates may use the title of accredited editor (AE). Equally qualified are the distinguished editors who managed the first two IPEd accreditation exams.

Does your organisation have specific guidelines to be followed?

If there is a preferred style for headings, spelling, referencing, abbreviations and acronyms then this must be provided to the editor.

Are there similar documents that can be used as a reference or is this job part of a larger work such as a series of related documents?

The editor also needs to know who the contact person is for clarification of issues and reporting of progress and if editorial changes are to be approved on an ongoing basis.

Do you need a confidentiality agreement/formal contract for this work?

Logistics

Your editor will need to know the practicalities of the project – its size, administrative details, consultation process etc.

1. How big is the project and what timelines are involved?
2. Is the work to be provided as hard copy or electronically?
3. What program has been used to create the document?
4. Does the work need to be returned showing tracked changes?
5. How many tables/figures/graphs/references are involved and does the editor need to check these for permissions?
6. What are the deadlines associated with this project?
7. Will the editing be limited by its timeline or its budget?

Who is the intended audience for this project?

Who will be reading this work and for what purpose – as general reading, reference, technical resource?

How familiar will the intended audience be with the content – will they skim the text or refer to it continually?

What should your editing brief include?

1. Explain what is to be done—specify level of editing required, if copy for captions/illustrations/blurb required, if permissions needed.
2. Provide guidelines for design and typesetting if part of project—style guide, preferred spelling, referencing, headings etc.

3. Include all items to be edited — manuscript or CD, photographs, illustrations, graphs, author's comments. Run a virus check on computer files before sending. Make sure you send the FINAL versions.
4. List any material that is still to be provided and indicate when it will be delivered.
5. Give details, including contacts, about the relevant parties—editor, client, contact person—lines of communication, level of accountability/authority.
6. Provide any relevant background regarding the work to be edited.
7. Specify timelines when the work is to be completed; specify any stages when work is to be returned to the client, and in what format.
8. Detail how variations to the brief are to be agreed.
9. Restate agreed remuneration and what this includes (i.e., reimbursement of costs of meetings, parking, couriers, postage etc.). Be realistic in your expectations of what your editor can achieve in the time allowed/budgeted. Not every editorial issue can be resolved in a single review of a document.
10. Include administrative details such as payment details, termination of/alterations to contract, crediting the editor in the project.

For an itemised list of editorial services that you might want to include in your brief, see the commissioning checklist developed by the Canberra Society of Editors (available through the IPEd website).