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# Draft Revised Professional Editorial Standards

## Introduction

### What is editing?

Editing involves carefully reviewing material before it is published and suggesting or making changes to correct or improve it. The goal of editing is to ensure that the material is consistent and correct and that its content, language, style, and design suit its purpose and meet the needs of its audience.

The editor is an intermediary who must skilfully and tactfully balance the interests of those who have commissioned the work and developed the material and, ultimately, the intended audience(s). The editor is also part of a team that guides a work through its various stages from creation to publication and must be familiar with, and respectful of, the contributions of others. The editor must collaborate effectively with all team members.

### What are professional editorial standards?

*Professional Editorial Standards (PES)* is a vital document for editors in Canada and for the editing profession. The 2009 version of *PES* defined the standards as “the knowledge, skills, and practices most commonly required for editing English-language material.” The standards articulated in *PES* are statements about levels of performance that editors aspire to achieve. They clarify what is expected of Canadian editors and define the criteria against which their knowledge, skills, and practice can be measured.

The editor who meets these standards is able to do a professional job with minimum supervision.

### Why have professional standards?

The standards defined in *PES* are used by . . .

Editors to

- better understand the range of skills and knowledge they should aspire to
- support their own continuing education and professional development
- explain what editing is and what editors do
- define best practices for doing their work

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**Employers to**

- know what to expect from the editors they hire
- develop job descriptions
- create performance evaluation tools

**Clients to**

- know what to expect from the editors they hire
- understand and negotiate editors' services

**Educators to**

- develop editing training courses and programs

**Editors Canada to**

- develop and maintain certification
- explain what editors should do when performing various stages of editing
- increase awareness of the value of editing
- provide products and services to editors throughout their careers
- design material, seminars, and courses on editing
- support and advance the interests of editors and excellence in editing

**Does PES cover the entire publishing process?**

No. *PES* covers the four stages of editing that begin when the material is more or less complete, and end when it's ready for publication:

- structural editing
- stylistic editing
- copy editing
- proofreading

Part A covers the knowledge and practices required of all professional editors, no matter which stages they work on. Parts B through E cover the skills required at each stage.

The standards do not cover other publication stages or tasks, such as writing, developmental editing, indexing, translation, marketing, or project management.

**Does PES describe all types of editing?**

No. Editors work on many subjects and types of publications that require specialized knowledge and skills. For example, medical editors have to know medical terminology, fiction editors must understand character and story arcs, editors of speeches have to be sensitive to rhythm and attention span, and website editors need to be familiar with search engine optimization (SEO) algorithms.

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Certain editing jobs often comprise a bundle of standards at different stages of editing. Plain language editing, for example, might include a mix of structural editing (improving organization and content) and stylistic editing (clarifying meaning).

*PES* does not try to capture all standards that all editors follow all the time. Instead, it captures the core standards—the standards most commonly required.

**Does PES focus on traditional print publishing?**

No. *PES* covers the core standards that all Canadian editors follow, regardless of the type of material they work on or how they edit.

**Does every editor use the same terminology?**

No. In our quickly evolving field, people who edit use a broad range of terms to describe what they do, the material they work on, and the creators of the original work.

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## A. The Fundamentals of Editing

Professional editors perform a variety of tasks, from managing an entire publishing process to performing only a specific part of it. Regardless of the extent of their involvement, all editors need to have a broad understanding of various processes and their role within them.

In their work, professional editors should

- demonstrate initiative and flexibility,
- be able to adapt to the needs of the project and the specific work environment,
- communicate clearly and tactfully, and
- respect the opinions of others.

Before undertaking a project, professional editors should ensure that they have the skills, training, and experience necessary to complete the work. Editors should continue to improve and upgrade their knowledge and skills throughout their careers.

The Fundamentals seek to encompass, in general terms, the knowledge (A1 through A6) a professional editor must be equipped with to complete the tasks stated here as fundamental practices of editing (A7 through A12).

For example, in areas such as design and production (A6), the editor may not always have a hands-on role but still needs to know and understand the basic principles and tools to do a proper edit. However, other areas of the editor's knowledge, such as knowing how the scope of a project affects the edit (A3) and knowing the legal and ethical requirements in publishing (A5), may lead directly to the editor's intervention—that is, to applying skills and practices such as revising for style (A8) and flagging copyright violations (A9). These areas of knowledge, therefore, have direct counterparts in some of the practices listed in the second part of this section.

A professional editor meets the following standards.

### Knowledge

#### A1 Know the publishing process

Know that editors are part of a larger publishing process, whether for print or electronic media. Understand the stages of the process and the roles of the other team members so that the editing work complements the work of the other team members.

- A1.1 Understand the stages of a project, the typical roles and responsibilities of a production team, and the editor's place in the publishing process.
- A1.2 Understand the generally recognized stages of the editorial process and be aware that they may overlap or unfold differently during a given project.

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A1.3 Know the terminology commonly used in editing and publishing.

A1.4 Understand the different types of publications and media and the implications these have for editing and production choices.

**A2 Know the importance of the audience and the purpose of the material**

Be aware of how the audience and purpose of the material affect the editing and production choices. At every stage, look ahead to the final product.

**A3 Know how the scope of a project affects the editorial process**

Understand how editing is influenced by the scope of a project: what the project is (its purpose, audience, and medium); the level of editorial intervention required; the time, budget, and other resources available; the roles and responsibilities of the key players in the project; and the lines of authority.

**A4 Know the medium**

Know the conventional parts of different types of publications and understand their purposes and their usual order or placement (e.g., parts of a book, newsletter, government or corporate report, website, or other electronic publication).

**A5 Know the legal and ethical requirements pertaining to publishing**

Understand that an editor is part of a process with legal and ethical dimensions.

A5.1 Understand the legal dimensions of the publishing process, including the fundamental concepts of copyright (e.g., ownership of works, public domain, licensing, moral rights), plagiarism, libel, obscenity, privacy protection, and related matters.

A5.2 Understand the ethical dimensions of the publishing process (e.g., the need to address biased, non-inclusive, and offensive material and the need to respect confidentiality and privacy).

A5.3 Understand the editor's roles and responsibilities in these parts of the process and know the importance of addressing any related issues that arise at any stage in the edit.

A5.4 Know when permissions are required.

**A6 Know the basic elements of the design and production processes**

Be aware of the role an editor plays in the design and production processes and understand the basic principles, conventions, terminology, and tools of that process.

A6.1 Understand how design can be used to convey meaning and to improve readability and accessibility in print and electronic media.

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- A6.2 Understand how textual elements and the interrelationship between text, format, and design can affect readability and accessibility in print and electronic media.
- A6.3 Understand the conventions for displaying tables, figures, graphs, maps, and other visual elements.
- A6.4 As the task requires, recognize typographical characteristics, including typographical measures (e.g., pixels, points), text alignment (e.g., indentation, justification), spacing (e.g., letter and line spacing), and typeface (e.g., serif, sans serif, weight, x-height, ascender, descender).
- A6.5 As the task requires, be familiar with software commonly used for design, formatting, electronic publishing, and web authoring (e.g., Acrobat, InDesign, LaTeX).
- A6.6 As the task requires, be familiar with common visual elements, such as the main graphic formats (e.g., EPS, JPEG, TIFF, PNG) and types of images (e.g., icons, photographs, video excerpts, illustrations).

## Practices

### A7 Set and maintain a realistic schedule

Set realistic schedules and meet deadlines, whether working, for example, as an editor who sets and maintains a project schedule, as a staff editor who handles one part of a larger schedule, or as a freelance editor who balances the deadlines of various clients.

### A8 Define and apply the appropriate editorial intervention

Bearing in mind the scope of the project and your editorial authority, assess the quality of the material and determine the editorial intervention that is appropriate.

- A8.1 Determine the extent of the edit to be applied: the stage or stages (structural editing, stylistic editing, copy editing, proofreading) and the level of edit (heavy, light). Use editorial judgment when deciding whether to intervene, leave as is, query, change, or recommend a change.
- A8.2 Having determined the extent of the edit, recognize what needs to be changed and edit according to established editing conventions and style, as well as any organizational editorial practices and standards (e.g., controlled language specifications).
- A8.3 Ensure that the format is appropriate for the material to best meet the needs of the intended audience, purpose, and medium.
- A8.4 Consider the implications of time, cost, production processes, and the intended audience and purpose when suggesting changes. At the earliest opportunity, flag problems that may affect the schedule or budget.

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**A9 Identify and address legal and ethical problems**

Bearing in mind the legal and ethical dimensions of the publishing process, at the earliest possible opportunity, address any related issues that arise.

- A9.1 Identify and either resolve or flag possible instances of legal problems (e.g., copyright infringement, plagiarism, libel, obscenity, privacy violations) or ethical problems (e.g., breaches of the requirements for confidentiality and privacy).
- A9.2 Identify and either remove, amend, flag, or document potentially biased, non-inclusive, and offensive material (e.g., racist, sexist, culturally stereotyped assumptions or content).

**A10 Use common editing resources**

Use editing resources, including software and reference materials relevant to editing, competently and efficiently.

- A10.1 Use current electronic technology, software, and systems for working with and sharing materials with authors, clients, or team members.
- A10.2 Maintain competency in software and software features relevant to editing (e.g., finding and replacing items, marking revisions, and checking consistency, spelling, and language level).
- A10.3 Know where to find and how to use current, reliable reference works such as style guides, dictionaries, and databases.

**A11 Ensure edits are clearly communicated so that they can be properly applied and captured in the production process**

Communicate edits clearly. Manage files and documents methodically.

- A11.1 Ensure everyone on the team is aware of the appropriate level of intervention for the edit.
- A11.2 Clearly mark and convey changes, suggestions, and directions orally or in writing (e.g., electronic or paper markup, margin notes, emails, assessments).
- A11.3 Communicate clearly and tactfully with team members at all stages.
- A11.4 As the task requires, keep copies of successive versions, identify who has made the changes, and take steps to ensure that all parties are using the current version of a document.
- A11.5 To the extent possible, verify that requested changes have been made correctly and ensure that material approved in preceding stages has not been changed unintentionally.

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**A12 Introduce no new errors**

Make all changes without altering intended meaning or introducing errors.



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## B. Standards for Structural Editing

Structural editing is assessing and shaping material to improve its organization and content.

A professional structural editor demonstrates a mastery of *Part A: The Fundamentals of Editing* and meets the following standards.

### Assessment

- B1 Assess the overall organization and content of the material to determine its suitability for the intended audience, medium, market, and purpose.

### Organization

- B2 Reorganize material to achieve a coherent structure and sequence, a logical progression of ideas, and a narrative or expository flow and shape appropriate to the audience, medium, and purpose, keeping in mind that the medium often determines organization (e.g., the inverted pyramid structure of a news story, the chapter arrangement of a book, the linked structure of a website). If necessary, create a new outline or site map and either follow it or recommend it be followed.
- B3 If necessary, recommend headings and navigation aids to clarify or highlight organization of material.
- B4 Recommend or implement the most effective positioning of auxiliary textual material (e.g., sidebars and pull quotes).
- B5 Determine and either indicate or implement the most effective positioning of all visual elements.
- B6 Revise, cut, or expand material, or suggest such changes, to meet length requirements.

### Content

- B7 Identify and either recommend or make appropriate deletions (e.g., to remove repetitive, irrelevant, or otherwise superfluous material) and additions (e.g., to fill gaps in content or strengthen transitions between sections) in both text and visual elements.
- B8 Recognize and either query or resolve instances of questionable accuracy, inadequate research, imbalanced content, and lack of focus.
- B9 Recognize and recast material that would be better presented in another form (e.g., number-laden text as a table, descriptive material as a diagram or infographic, a long series of points as a list, a lengthy digression as an appendix).

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- B10 Select, create, or secure appropriate visual elements (e.g., images, video, figures), if necessary, in keeping with the requirements and constraints of the publication (e.g., budget, schedule, format, medium). Determine the appropriate content and length of captions, titles, and alt text.
- B11 Identify, create, or secure appropriate supplementary and reference material (e.g., glossaries, endnotes, links).
- B12 If required, create or secure accurate and complete supplemental material (e.g., audio and video, popups, mastheads, front and back material).
- B13 Determine whether any permissions are necessary (e.g., for quotations, visual elements, audio). If necessary, obtain these permissions or bring the matter to the attention of the appropriate person.

**Communication**

- B14 Communicate clearly and diplomatically with the author or project supervisor to confirm structure, request clarification of content, and propose or negotiate broad editorial changes.

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## C. Standards for Stylistic Editing

Stylistic editing is editing to clarify meaning, ensure coherence and flow, and refine the language. Stylistic editing is often done as part of a structural edit or copy edit rather than as a separate step.

A professional stylistic editor demonstrates a mastery of *Part A: The Fundamentals of Editing* and meets the following standards.

### Clarity

- C1 Improve paragraph construction to more effectively convey meaning (e.g., divide long or complicated paragraphs into simpler ones, adjust paragraph length for the medium and audience, establish clear topic sentences).
- C2 Improve sentence construction to more effectively convey meaning (e.g., divide long or complicated sentences into simpler ones, use subordinate structures for subordinate ideas, choose active voice over passive in most contexts, replace negative constructions with affirmative ones, make non-parallel constructions parallel).
- C3 Improve word choice to more effectively convey meaning (e.g., by replacing the general and abstract with the specific and concrete, replacing noun strings and nominalizations, eliminating clichés and euphemisms) where appropriate.
- C4 Revise sentences, paragraphs, and passages to resolve ambiguities, ensure logical connections, and clarify the meaning or intention, as appropriate to the material.
- C5 In improving a sentence, paragraph, or passage or making it intelligible, change only what is required, while maintaining the authorial voice where appropriate.
- C6 Ensure all tables and visual and audio elements are clear and effectively convey the intended meaning.

### Coherence and Flow

- C7 Ensure that transitions between sentences and between paragraphs are smooth and support the coherent development of the text as a whole.
- C8 Where necessary, reorder elements to ensure coherence (e.g., sentences in a paragraph, bullets in a list, components of a web page, logical order).
- C9 Adjust the length and structure of sentences and paragraphs to ensure readability, flow, and variety or consistency, as appropriate to the audience and medium.

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**Language**

- C10 Determine the language and reading level appropriate for the intended audience, medium, and purpose, and edit to establish or maintain that language and level (e.g., by translating jargon into understandable terms, using vocabulary that is suitable to the material, dividing long or complicated sentences into simpler ones).
- C11 Establish, or maintain, or enhance tone, mood, style, and authorial voice or level of formality appropriate to the content and for the intended audience, medium, and purpose (e.g., making text more engaging or entertaining).
- C12 Eliminate wordiness (e.g., by deleting redundancies, empty phrases, unnecessary modifiers).

**Communication**

- C13 When working onscreen, use an agreed-upon system for showing and tracking edits (e.g., track changes, PDF markup tools, revision management systems). When working on paper, mark clearly and use standard editing marks unless another system has been agreed upon.
- C14 Use judgment about when to query and when to resolve problems without consultation.
- C15 Clearly and diplomatically, request clarification of meaning and intent, explain changes as appropriate, and propose or negotiate significant editorial changes.

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## D. Standards for Copy Editing

Copy editing is editing to ensure correctness, accuracy, consistency, and completeness.

A professional copy editor demonstrates a mastery of *Part A: The Fundamentals of Editing* and meets the following standards.

### Correctness

- D1 Understand English grammar and correct errors (e.g., lack of subject–verb agreement, misplaced modifiers, incorrect pronoun case).
- D2 Understand the principles of punctuation and correct errors (e.g., comma splices, misplaced colons, incorrect apostrophes). Know when exceptions can be made (e.g., in fiction or advertising copy).
- D3 Correct errors in spelling (e.g., typographical errors, errors arising from homonyms and similar-sounding words).
- D4 Correct errors in usage (e.g., words commonly confused, such as *imply/infer*; incorrect idioms and phrases, such as *hone in*).

### Accuracy

- D5 Identify and either correct or query general information that should be checked for accuracy (e.g., historical details, narrative timelines, calculations, quotations, URLs) using standard research methods and tools (e.g., dictionaries, atlases, calculator, search engines).
- D6 Review visual material (e.g., labels, cross-references, callouts on illustrations) and organizational information (e.g., table of contents, menus and links in online documents) to ensure they are accurate and correct, or query as required.
- D7 Identify and either correct or query errors in material containing statistics, mathematics, and numerals (e.g., incorrect imperial/metric conversions, incorrect totals in tables).

### Consistency

- D8 Identify and consistently apply editorial style (e.g., abbreviations, treatment of numbers, Canadian/British/American spelling, URLs).
- D9 Develop a style sheet, or follow one that is provided, to track editorial style and apply it consistently.

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- D10 Understand methods for documenting sources (e.g., reference list, footnotes, links) and consistently apply an editorial style (e.g., APA, Chicago) appropriate to the material or as directed.
- D11 Identify and either query or correct arbitrary and confusing shifts and variations in terminology, logic, and mechanics (e.g., metaphors, characterization, spelling, numbers, abbreviations).
- D12 Ensure all tables, visual elements, and multimedia are consistent with surrounding text and are consistently presented (e.g., heading and caption styles, numbering).
- D13 Understand the issues related to using other languages, especially French, in an English context (e.g., capitalization, italicization, diacritical marks) and edit for consistency.

### **Completeness**

- D14 Ensure material is complete and, as appropriate, query or supply missing elements (e.g., captions and headings, web links, contact information).
- D15 Recognize and flag places where citations are needed (e.g., quotations without a source, unsupported generalizations in academic work, tables that require a data source).
- D16 Recognize elements that require copyright acknowledgement and permission to reproduce (e.g., quotations, multimedia, visual elements). If necessary, prepare acknowledgements and obtain permissions or bring the matter to the attention of the appropriate person.

### **Communication**

- D17 When working onscreen, use an agreed-upon markup system (e.g., track changes, PDF markup tools). When working on paper, mark clearly and use standard copy editing marks unless another system has been agreed upon.
- D18 Use judgment about when to query the appropriate person (e.g., author, client, other team member) and when to resolve problems without consultation.
- D19 Write clear, coherent, and diplomatic queries and notes for the appropriate person (e.g., author, client, other team members).

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## E. Standards for Proofreading

Proofreading is examining material after layout or in its final format to correct errors in textual and visual elements.

A professional proofreader demonstrates a mastery of *Part A: The Fundamentals of Editing* and meets the following standards.

### General Practices

- E1 Recognize the advantages and disadvantages of various proofreading strategies (e.g., reading on screen or on paper, reading with a partner, increasing screen magnification) and apply the appropriate strategy for the material and the scope of project.
- E2 Adhere to the editorial style sheet for the material and update it, if necessary. If no style sheet is provided, prepare one and update it as proofreading progresses.
- E3 In the first round of proofreading, read the material word by word and scrutinize visual elements as the task requires, comparing with previous copy if supplied.
- E4 In each subsequent round of proofreading, refrain from reading the entire text (unless instructed to do so) but check that all changes have been made as requested and that they do not introduce new problems (e.g., check line and page breaks, text flow, visual elements, table of contents, navigation bar).
- E5 At all proofreading stages, flag or correct egregious errors but refrain from undertaking structural, stylistic, or copy editing tasks unless authorized to do so.
- E6 Whenever possible, proofread the material in its intended medium.

### Error Correction

- E7 Understand English spelling, grammar, and punctuation, and correct errors (e.g., lack of subject–verb agreement, misplaced modifiers, incorrect pronoun case) within the limits of the proofreading role.
- E8 Ensure that the first proof contains all the copy and any additional elements prepared for layout (e.g., all paragraphs, visual and audio elements, additional textual elements such as captions or acknowledgements).
- E9 Flag typographical and formatting errors and irregularities, paying special attention to problematic areas (e.g., wrong font, widows and orphans, ill-fitting text, page breaks, rivers and lakes, non-English words, table and figure formatting).

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- E10 Check consistency and accuracy of elements in the material (e.g., cross-references, running heads, captions, web page title tags, links, metadata).
- E11 Check end-of-line word divisions and mark bad breaks for correction.
- E12 Understand design specifications and ensure they have been followed throughout (e.g., alignment, heading styles, line length, space around major elements, rules, image resolution, appearance of links).

### **Judgment**

- E13 Recognize and flag matters that may affect later stages of production (e.g., page cross-references; placement of visual elements; alterations that will change layout, indexing, or web navigation).
- E14 Query, or correct if authorized to do so, inconsistencies (e.g., in spelling, punctuation, facts, visual elements, navigation elements, metadata, other content that may not appear on a published web page). Use judgment about the degree to which such queries and corrections are called for.
- E15 Incorporate alterations from authors and other individuals, using judgment and tact. Where comments conflict, use judgment to mark appropriate alterations.
- E16 Choose from among various options the changes at each stage of proofreading that will prove the least costly or the most appropriate, given the production process, schedule, medium, desired quality, and type of publication (e.g., contact information must be corrected but inconsistent capitalization might be left as is).

### **Communication**

- E17 When working on screen, use an agreed-upon markup system (e.g., PDF markup tools). When working on paper, mark clearly and use standard proofreading marks unless another system has been agreed upon.
- E18 Communicate more detailed instructions to the appropriate person (e.g., designer, project supervisor) as needed for the sake of clarity.
- E19 Distinguish between and mark differently printer's, designer's, or programmer's errors and author's or editor's alterations, if requested.