

s *f* e p

code of practice

society for editors and proofreaders
upholding editorial excellence

Contents

1	Introduction	
1.1	Purpose of the Code of Practice	3
1.2	The need for the code	3
1.3	The status of the code	3
2	Definitions	
2.1	Professional roles	4
2.2	Types of work	4
3	Professional practice of the supplier or employee	
3.1	Professional standards	5
3.2	Working agreements and fees	7
3.3	Working relationships with clients, authors and colleagues	7
3.4	Confidentiality	8
4	Professional practice of the client or manager	
4.1	Briefing and handover	9
4.2	Working agreement and fees	10
4.3	Working relationships with editors and authors	11
4.4	Loyalty and confidentiality	11
4.5	Feedback	11
5	Standards of editing and of proofreading	
5.1	Before accepting work as an editor	12
5.2	Before accepting work as a proofreader	12
5.3	Responsibilities of the editor and the proofreader	13
5.4	Copy-editing printed materials: basic skills	14
5.5	Copy-editing websites	15
5.6	Proofreading printed materials: basic skills	16
5.7	Collation	17
5.8	Proofreading websites	17
6	Standards of editorial project management	
6.1	Scope	19
6.2	Processes involved: printed materials	19
6.3	Processes involved: website materials	21
6.4	Skills required	22
6.5	Liaison with authors	22
6.6	Liaison with others	23
7	References	24
	Index	26

1 Introduction

1.1 Purpose of the Code of Practice

The purpose of this code is to establish and maintain standards of best practice for members and associates of the Society for Editors and Proofreaders (SfEP).

1.2 The need for the code

A member or associate of SfEP may at different times act as a client or manager, commissioning services from self-employed or employed editors; or as a supplier of services to such a client or employer, often a publisher, whether in the mainstream publishing industry or other business. This code sets out standards of best practice both in the execution of the editorial processes and in the operation of a professional business. To achieve best results, both client and supplier should make explicit their expectations and agree on how they are to be fulfilled. This document aims to codify the best practice of both parties and suggest ways in which that may be implemented.

The code therefore describes both the overall practice of publishing and the particular content of the work undertaken, in the following sections:

- 3 Professional practice of the supplier or employee
- 4 Professional practice of the client or manager
- 5 Standards of editing and of proofreading
- 6 Standards of editorial project management.

1.3 The status of the code

This code is endorsed by the SfEP council and is representative of the views of the Society.

The attention of members and associates is drawn to clause 6 of the Articles of Association which reads: '... in signing the Membership form the Member agrees to be bound by the bye laws, rules and regulations and the Codes of Practice of the Society ...'

All members and associates of the Society are therefore expected to adhere to the Code of Practice to the best of their ability (see **3.3.6c**).

2 Definitions

2.1 Professional roles

- 2.1.1 **'members and associates'** This term includes all advanced members, ordinary members, individual associates and corporate associates of the Society.
- 2.1.2 **'supplier'** This term includes any member or associate of the Society, or other editor or proofreader, who may be contracted as a supplier of editorial services.
- 2.1.3 **'client'** This term is used to define any member or associate of the Society or other publisher or client, whether in the mainstream publishing industry or other business or not-for-profit organization, who commissions editorial services and who is responsible for the published product.
- 2.1.4 References in this code to the relationship between supplier and client are also intended to include, where applicable, the relationship between an employed editor or proofreader and his or her manager or employer.

2.2 Types of work

- 2.2.1 **'editing'** In this code, 'editing' embraces copy-editing, proofreading and editorial project management. It is used as a general term for the range of work undertaken by members and associates, in the context of printed or electronic publication.

To avoid confusion, the term 'copy-editing' is reserved for the specific task of preparing a text for publication, including stylistic, structural, intrusive and substantive editing where applicable (see 5.1.3).
- 2.2.2 **'proofreading'** This term is used in this code to define a process of identifying typographical, linguistic, coding or positional errors and omissions on a printed or electronic proof, and marking corrections.
- 2.2.3 **'editorial project management'** This term is used in this code to describe the carrying out or overseeing of all agreed editorial aspects of a publishing project, which can be from a stage before submission of a manuscript, but not including commissioning, to the final checking stage before submitting the work to a printer or electronic publisher. It will usually include contact with the author(s) and may include responsibility for briefing others.

3 Professional practice of the supplier or employee

3.1 Professional standards

3.1.1 Members and associates should in all working relationships endeavour to maintain standards of work and conduct consistent with their professional status and should not act in such a way as to bring their profession or the Society into disrepute.

3.1.2 Continuing professional development (CPD) Members and associates should make every reasonable endeavour to maintain, improve and update their skills and knowledge, especially where new technology creates changes in publishing practice. This could include reading trade journals and reference works, requesting feedback from clients, seeking advice from colleagues or attending training courses and conferences.

3.1.3 Legal issues Members and associates should be familiar with the main provisions of the current relevant legislation relating to libel, obscenity, blasphemy, incitement to racial hatred, plagiarism and the reproduction of copyright material belonging to third parties. They should endeavour to ensure that these provisions are adhered to and bring any suspected infringement to the attention of the client.

3.1.4 Self-promotion Suppliers should give a true and fair representation of their qualifications, experience and skills when advertising or describing their services.

3.1.5 Competence Suppliers should not accept any job which they believe they cannot carry out to an acceptable standard, for whatever reason. Such reasons could include:

- a** the client allows inadequate time or remuneration for the amount of work required to complete the job to an acceptable standard;
- b** the supplier has insufficient time available to accommodate the amount of work required;
- c** the supplier has inadequate skills or knowledge for the type of work involved (although a supplier may accept such work on a 'trainee' basis, with the explicit agreement of the client).

If a supplier accepts a job in good faith but subsequently discovers that he or she cannot carry it out to an acceptable standard, the client should be informed as early as possible, and the supplier should be prepared to negotiate a settlement.

3.1.6 Responsibility to clients Suppliers are accountable for their services: they are responsible for making the best use of the time available for a job, and expediting its completion to the required standard within the client's specified schedule, whenever possible.

3.1.7 Presentation of work Suppliers should present their work in a professional manner consistent either with normal trade practice or with a convention agreed with the client. Correspondence, additional text, lists of queries, cover sheets, illustration lists, invoices, etc. should be typed or word-processed; any handwritten notes or corrections should be neat and legible.

3.1.8 Management of software files Original documents are frequently supplied in electronic form, whether by email or on disk (floppy, zip or CD).

- a** Files supplied by a client should be virus-checked upon receipt.

- b The client's original files should not be overwritten, but renamed before editing. A protocol should be agreed with the client for the renaming of electronic files.
- c Where work is supplied on disk, a time-scale should be agreed for the return of client's and suppliers' disks at the completion of a job.
- d Suppliers' disks should be clearly labelled and dated so that they are easily identifiable.
- e It is recommended that copies of completed work sent to the client should be retained in electronic format by the supplier until at least six months after the publication date of the work.

3.1.9 Original material and records It is the responsibility of the client to insure against loss of original material by keeping copies, etc. However, suppliers should take all reasonable precautions to ensure the safe keeping of documents and original material belonging to or held on behalf of clients and, where indicated, should use the method of dispatch suggested by the client. They should keep copies of query lists and important correspondence with third parties, including emails and records of phone conversations, and should make these available to the client on request.

3.1.10 Communication While a job is in progress, suppliers should keep clients informed of their availability, by email or telephone, giving alternative access numbers where appropriate. Urgent communications should be carried out by telephone, to avoid emails remaining unanswered.

3.1.11 Email

- a Members and associates who advertise an email address should collect their email regularly and respond to it promptly.
- b Although they may be informal in style, emails should be written using correct grammar and punctuation.
- c Emails should be copied to the relevant people, where appropriate.
- d Members and associates should be aware of email etiquette, for example:
 - when replying to a message, trim any unnecessary material;
 - use plain text emails in preference to HTML;
 - do not send unsolicited attachments without first checking with the intended recipient;
 - identify or describe the content and nature of the attachment in the text of the email.
- e When participating in email discussion groups, members and associates should maintain appropriate standards and abide by the rules of the discussion group.

3.1.12 Subcontracting Suppliers should not subcontract work to others without the knowledge and consent of the client. When subcontracting work, suppliers should satisfy themselves that the subcontractor is competent and reliable. Suppliers remain responsible for the terms they agree with the client and for the quality of work supplied to the client.

3.1.13 Independence Self-employed members and associates must take full responsibility for the running of their businesses and for their obligations to the Inland Revenue and other official bodies. They should make their self-employed status known to clients.

3.1.14 Working environment Members and associates should seek to ensure that they have an environment in which they can work efficiently and with appropriate concentration, and that they have access to the necessary equipment (including both computer hardware and software) and reference material for the type of work undertaken. Members and associates should also make themselves aware of the health and safety legislation which applies to their working environment, and office equipment should be chosen and arranged with long-term health and safety in mind.

3.2 Working agreements and fees

3.2.1 Agreement of terms In their own interests, suppliers should ensure that the terms on which they accept a job are clearly defined at the outset, either by the supplier or by the client, and agreed between the parties, preferably in writing. Any terms and conditions beyond those which ordinarily apply should also be agreed at the outset.

Any agreement should include:

- a** the date(s) for delivery of the job, or instalments thereof, to the supplier;
- b** the date(s) for delivery of the completed job, or instalments thereof, to the client;
- c** an estimate of the work required, including due allowance for time spent assimilating the brief, preparing handover notes and correspondence, as agreed;
- d** the proposed fee for the job, or alternatively the rate per hour or page and, where possible, an estimate of the total;
- e** which expenses (e.g. postage, telephone, fax or internet charges, paper, software, copying, travel) are to be borne by the client and, where possible, an estimate of their amount;
- f** any special dispatch requirements for material belonging to or held on behalf of the client by the supplier;
- g** the payment period from invoice date and any arrangement for payment by instalments;
- h** whether or not the copy-editor's or proofreader's work will be credited and a complimentary copy of the published work is to be provided.

3.2.2 Progress reports It is the supplier's responsibility to keep the client informed of progress as appropriate.

3.2.3 Changes in circumstances The supplier should make every reasonable endeavour to adhere to the agreed budget and schedule for a job. Whenever circumstances arise which make it fair and reasonable that the agreed terms be renegotiated – e.g. where the work received is not of the standard, length or complexity envisaged – the supplier should inform the client at the earliest opportunity to agree on a strategy for completing the work.

3.3 Working relationships with clients, authors and colleagues

Members and associates should be aware of their responsibilities with respect to personal data under the Data Protection Act 1988.

3.3.1 General attitude In all working relationships, members and associates should treat their professional colleagues with due consideration and respect, and should co-operate with them to the best of their ability.

3.3.2 Relations with clients

- a** *Communication* In all dealings with clients, suppliers should recognize that they bear equal responsibility with the client for effective communication and for the successful completion of any job undertaken. Suppliers should be pro-active in raising with the client or others matters that require attention.
- b** *Briefing* Suppliers should endeavour to obtain a clear and adequate brief for any job undertaken. The brief should set out the tasks to be carried out and the limits of the supplier's responsibility. While the onus rests on the client to supply essential information, suppliers should seek clarification of any points not covered by the brief.

3.3.3 Relations with authors It is in the interest of suppliers to build up satisfactory and mutually respectful working relationships with authors on whose texts they are working, and to

respect their sensitivities. Suppliers should recognize authors' rights, including moral rights, and should use their best endeavours to avoid overstepping reasonable levels of editorial intervention within the context of the level of edit agreed with the client (see **5.1.3**). The supplier has the right to expect the client to have agreed with the author the terms of the brief, the level of copy-editing required and the schedule requirements, and to expect the client's reasonable support in relations with the author and others in the publishing process, particularly in the event of any dispute.

3.3.4 Relations with subcontractors Members and associates who subcontract work to others thereby place themselves in the role of client in relation to these subcontractors and are under an obligation to fulfil the requirements of section 4 of this code.

3.3.5 Relations with third parties Members and associates should make every effort to maintain good relations with other professional colleagues, such as designers, website programmers, picture researchers, typesetters and printers.

3.3.6 Relations with the Society and its members and associates

- a *General attitude* Members and associates should endeavour to uphold and promote the objectives of the Society as set out in its Memorandum of Association. Members and associates should feel able to call on colleagues for advice and information and should be prepared to reciprocate.
- b *Use of the Society's name* Members and associates are encouraged to make their membership of the Society known to clients and colleagues. Ordinary and advanced members may use the words 'Member of the Society for Editors and Proofreaders' on their stationery, but abbreviations such as MSfEP are not permitted. A special Society logo is available for use by advanced, accredited and registered members, but other use of the Society's logo or letter-head is not permitted except with the written authorization of the council.
- c Members and associates are reminded of the provision in the Articles that if in the opinion of the council any member or associate seriously misrepresents the Society or brings it into disrepute, his or her membership may be withdrawn. Serious breach of this code, for example, could be regarded as grounds for withdrawal of membership.

3.4 Confidentiality

3.4.1 Relating to members and associates Members and associates should respect the confidence of colleagues and refrain from discussing them by name with third parties (except with permission, e.g. if asked to provide a reference).

3.4.2 Relating to clients In the course of dealings with clients, members and associates may be privy to confidential information and have access to sensitive and/or unpublished material, whether contained in a text or in discussions and correspondence. Members and associates should at all times respect these confidences and under no circumstances disclose any such information to a third party without the express authorization of the client. In all dealings with third parties, members and associates should bear in mind that a supplier, in fulfilling their editorial obligation, is acting as the client's representative.

3.4.3 Relating to authors Members and associates should respect the confidence of the author and refrain from discussing individual authors by name, except with the client, before publication of the material.

3.4.4 Relating to documents Members and associates should take all reasonable precautions to ensure the safe keeping and subsequent disposal or return of confidential documents, either on paper or in electronic format, including copies.

4 Professional practice of the client or manager

This section covers the process by which editorial work is placed by a client.

4.1 Briefing and handover

4.1.1 Initial contact The client should provide an accurate initial description of the job to be placed, followed by a clear and comprehensive brief. The brief may be written or spoken, although a written brief is preferable. Where no written brief is forthcoming, suppliers are advised to confirm their understanding of the brief in writing. Clients should recognize that suppliers reserve the right not to accept work.

4.1.2 Nature of the work The brief should set out:

- the nature of the projected work;
- the extent of contact between supplier and author or other contributors;
- the name of the in-house contact.

A copy of the client's house style (where applicable) should also be supplied. The brief should also include the following details:

- a** the level of edit to be carried out (see **5.1.3**) and the scope and nature of the work to be performed on the document (e.g. resolution of ambiguities, illogicalities and anomalies of style; editorial changes to take account of contractually specified length);
- b** any specific requests from the author and any comments from expert readers (e.g. attention to language level);
- c** style and design to be followed (e.g. for consistency with related house works and series or pages elsewhere on a website), including electronic codes, tags or styles to use if appropriate. *Note:* Copy-editors expect to mark up for an educated native speaker of the language in which they are working, so if this is not the case it is important to make this clear at brief stage;
- d** style to be used for specific parts of the work as applicable (e.g. captions, tables, mathematics, references, appendices, glossaries, links);
- e** instructions for the presentation and listing of illustrations (photographs or half-tones, maps, diagrams, other artwork) and multimedia (animations, audio files, video files, interactive elements), and for the presentation of briefs for these, including labels on electronic files;
- f** instructions for listing items needing permissions and acknowledgements, and for handling these;
- g** a list of any undelivered material (e.g. preface or foreword).

4.1.3 Schedule The client should specify the schedule for the job, allowing sufficient time for the requirements of the brief to be carried out. The schedule should take into account any undelivered material and include an expected delivery date for this material.

4.1.4 Market requirements The brief should give details of the intended market and readership, any projected foreign editions and any related house works, series, CD-ROMs or websites.

4.1.5 Presentation of the manuscript The client should provide a complete manuscript; if in printed form, this should be cleanly printed out using double spacing and appropriate margins; any electronic files supplied should correspond to the hard copy. *Note:* The presentation of work in the form of a high-quality typescript or print-out does not necessarily imply a high-quality product.

4.1.6 Security The client should ensure that all electronic files supplied have been virus-checked. In addition, as a further precaution, the recipient should virus-check the electronic files.

4.2 Working agreement and fees

4.2.1 Agreement of terms The client should set out clearly the terms agreed.

Any agreement should include:

- a** the date(s) for delivery of the job, or instalments thereof, to the supplier;
- b** the date(s) for delivery of the completed job, or instalments thereof, to the client;
- c** an estimate of the work required, including due allowance for time spent assimilating the brief, preparing handover notes and correspondence, as agreed;
- d** the proposed fee for the job, or alternatively the rate per hour or page and, where possible, an estimate of the total;
- e** which expenses (e.g. postage, telephone, fax or internet charges, paper, software, copying, travel) are to be borne by the client and, where possible, an estimate of their amount;
- f** any special dispatch requirements for material belonging to or held on behalf of the client by the supplier;
- g** the payment period from invoice date and any arrangement for payment by instalments;
- h** whether or not the copy-editor's or proofreader's work will be credited and a complimentary copy of the published work is to be provided.

4.2.2 Negotiation and estimates The client should endeavour to give accurate estimates of the level or type of work and amount of work involved; it is helpful if the client indicates how such estimates are arrived at. The supplier has the right to negotiate staged payment or fee (or part-fee) in advance if appropriate and to have included in the fee an allowance for reasonable time spent assimilating the brief, writing up handover notes, attending meetings, and so on.

4.2.3 Changes in circumstances The client should inform the supplier of any changes to schedules and may negotiate further (in terms of budgets or schedules) in the light of material changes in the circumstances of the job.

4.2.4 Prompt payment The supplier shall expect to receive payment within a specified time, agreed in advance, from submission of the invoice or within 30 days, as set out in the Late Payment of Commercial Debts (Interest) Act 1998 – Amended and Supplemented in 2002. The client should be aware that the supplier has a statutory right to interest and compensation in the event of late payment.

4.2.5 Indemnity It is the responsibility of the client to insure against all loss of or damage to all artwork, photographs, manuscripts, disks and marked proofs while in transit between client

and supplier and while in the supplier's keeping. Where appropriate (e.g. in the case of manuscripts and disks), the client will keep copies. It is the supplier's responsibility to keep copies of software files, author queries and correspondence relating to the work.

4.2.6 Legal issues The client bears ultimate responsibility for matters relating to libel, obscenity, blasphemy, incitement to racial hatred, plagiarism and the reproduction of copyright material belonging to third parties.

4.3 Working relationships with editors and authors

The client should have agreed the terms of the brief, the level of copy-editing required and the schedule requirements with the author.

4.4 Loyalty and confidentiality

Clients should be aware of their responsibilities with respect to personal data under the Data Protection Act 1988.

The client should recognize that a supplier who is fulfilling his or her editorial obligation is acting as the client's representative, and has the right to expect the client's reasonable support in relations with the author and others in the publishing process, particularly in the event of any dispute.

The client should respect the confidence of the supplier.

4.5 Feedback

The client should be prepared to give constructive feedback to the supplier and to accept that one function of such feedback is to inform both parties about the level of success of the briefing process; as such, it is instrumental in initiating and maintaining a good relationship between client and supplier.

5 Standards of editing and of proofreading

5.1 Before accepting work as an editor

5.1.1 Application of general editing skills Members and associates should take all reasonable care to ensure, by virtue of their skills, training and/or experience, that they are competent to fulfil the expectations implied by use of the words 'editor' and 'copy-editor'. This should include consultation with the client to confirm that the supplier has appropriate, secure, up-to-date computer and communications equipment and software to fulfil the commission. Clients should be able to approach potential suppliers in the reasonable expectation that this is the case.

5.1.2 Application of level of edit In deciding how much work to undertake on a text to impose order in terms of style and substance and what level of edit to apply to it (see **5.1.3**), suppliers should consult with and be guided by the client and be prepared to work within the brief.

5.1.3 Levels of copy-editing This code subdivides copy-editing into the three levels set out below, but it is acknowledged that a combination of levels may be appropriate in certain types of work (e.g. multi-author works).

Level 1: technical This is non-intrusive copy-editing and the basic mark-up for the typesetter. The client wishes the material to be prepared for publication but is willing to accept the bulk of the text as received with minimal intervention. Inconsistencies and infelicities are nevertheless dealt with and copy-editing includes the points listed in **5.4**.

Level 2: structural This is where more intrusive copy-editing may take place; it can often apply to multi-author works when presentation is uneven. In addition to the requirements of the Level 1 copy-editing, above, the client will have agreed with the author that the text requires structural intervention for clarification. This work constitutes rephrasing as necessary rather than rewriting.

Level 3: substantive The client will have agreed with the author (who is primarily an information provider and not necessarily an experienced writer) that reconstruction and rewriting are necessary in order to adapt the material for its defined market, as well as Level 1 copy-editing and mark-up.

Note: At any of the above levels the client may or may not wish the supplier to be directly involved with the author in order to settle queries.

5.2 Before accepting work as a proofreader

5.2.1 Application of general proofreading skills Members and associates should take all reasonable care to ensure, by virtue of their skills, training and/or experience, that they are competent to fulfil the expectations implied by the use of the word 'proofreader'. This should include consultation with the client to confirm that the supplier has appropriate, secure, up-to-date computer and communications equipment and software to fulfil the commission. Clients should be able to approach potential proofreaders in the reasonable expectation that this is the case.

5.2.2 Application of level of proofreading In deciding how much work to undertake at the proof stage, suppliers should consult with and be guided by the client and be prepared to work within the brief.

5.3 Responsibilities of the editor and the proofreader

In exercising their responsibilities to themselves and their clients, suppliers should keep in mind the following points:

- a** the importance of obtaining an accurate brief, including level of copy-editing (see **5.1.3**) and nature of the job, i.e. whether it is all on hard copy, or hard copy plus electronic files, or electronic files only;
- b** the importance of editorial exactitude, good communication and punctuality;
- c** the importance of obtaining constructive feedback.

5.3.1 Brief from client to supplier Suppliers should ensure that the client supplies:

- a brief which sets out the nature of the projected work, the extent of contact between supplier and author or other contributors and the name of the in-house contact;
- a copy of the client's house style (where applicable).

Suppliers should request a brief where this is not supplied. It is important to make an initial assessment of the brief against the material provided before proceeding to the main part of the work, and in particular to evaluate whether the proposed schedules will allow sufficient time to carry out the requirements of the brief.

The brief should include the following details:

- a** the level of edit to be carried out (see **5.1.3**) and the scope and nature of the work to be performed on the document (e.g. resolution of ambiguities, illogicalities and anomalies of style; editorial changes to take account of contractually specified length);
- b** any specific requests from the author and any comments from expert readers (e.g. attention to language level);
- c** style and design to be followed (e.g. for consistency with related house works and series or pages elsewhere on a website), including electronic codes, tags or styles to use if appropriate;
- d** style to be used for specific parts of the work as applicable (e.g. captions, tables, mathematics, references, appendices, glossaries, links);
- e** instructions for the presentation and listing of illustrations (photographs or half-tones, maps, diagrams, other artwork) and multimedia (animations, audio files, video files, interactive elements), and for the presentation of briefs for these, including labels on electronic files;
- f** instructions for listing items needing permissions and acknowledgements, and for handling these;
- g** a list of any undelivered material (e.g. preface or foreword).

5.3.2 Communication between supplier and client

- a** Good communication, editorial exactitude and punctuality are vital. It is the supplier's responsibility to raise any initial queries with the client. A fundamental requirement in the good handling of any material is to raise major queries without delay, and other minor queries in batches as convenient to all concerned. If any matter in the brief or other

documentation or in matters under discussion with the client is unclear, the supplier should seek clarification as early as possible in the process.

- b** Early communication with the designer is desirable, if that comes within the editorial remit, and particularly if the material being edited is intended for a website.
- c** Since the supplier is responsible neither for commissioning work nor for contracting with an author, the supplier cannot be held responsible for questionable material (whether factual or otherwise) or material where possible legal problems (e.g. libel, infringement of copyright, plagiarism) may arise. However, a supplier becoming aware of any such problems in the material should bring these to the attention of the client. Any duty the supplier has to the client will be fully discharged by this process and the client, while being guided or advised as necessary by the supplier, bears the whole responsibility for deciding what is to be done in these cases.
- d** The supplier should make every reasonable effort to deliver completed work to schedule and should inform the client promptly if circumstances arise that make delay likely.
- e** When handing over the work the supplier should detail any material still outstanding from the client and provide for the client's convenience a sheet of style points specific to the work.

5.3.3 Feedback Suppliers should expect to be given constructive feedback from a client on the quality of and level of satisfaction with the completed work. This feedback may be sought following a first assignment from a new client, following an assignment of a different nature from an established client, or at any point in the working relationship where the supplier and client agree it would serve a useful purpose.

5.4 Copy-editing printed materials: basic skills

In the application of all three levels of copy-editing (see **5.1.3**), whether on hard copy or electronically, a copy-editor should be competent in the following skills:

5.4.1 Publication Understand the basic processes of producing a publication.

5.4.2 Grammar and spelling Identify and correct errors in grammar, spelling and punctuation, and in usage and style.

5.4.3 Command of English Possess a good command of English (or the working language) and an awareness of the constant evolution of language. Copy-editors should seek to establish and support good standards of clarity within the context of the work, and be conversant with the intended readership both geographically and in terms of language and understanding. Edit to the appropriate language level if necessary.

5.4.4 Consistency Establish a consistent style for the text; identify and eliminate or query inconsistencies; ensure that house style (where applicable) is followed. Create a copy-editor's style guide that can be passed on to the proofreader to ensure consistency throughout the text.

5.4.5 Factual accuracy Raise questions of factual accuracy and consistency regarding names, dates, events, people, places and references to visual elements as necessary. Refer these to the client or author as appropriate.

5.4.6 Awareness of ambiguities, etc. Delete irrelevancies, unnecessary repetitions and infelicities, and be able to correct ambiguities and to read for sense, clarifying as necessary and confirming alterations with the author(s) (see **5.1.3**).

- 5.4.7 Logic of textual structure** Ensure that the structure of the text is logical and consistent, including the hierarchy of headings. Establish and maintain consistency in the marking up of headings, paragraphing, contents page(s) and, where appropriate, running heads, quotations, tables, figures, legends, lists, textual references to notes, footnotes, references, glossaries, bibliographies and any other parts of a text requiring special presentation. Use electronic means to achieve this as appropriate.
- 5.4.8 Author queries** Raise queries for the author and present these intelligibly (not necessarily resolving them – see 5.1.3).
- 5.4.9 Copy-editing symbols** Use current British Standard copy preparation symbols and minimal margin notation. However, copy-editors should be aware that not all designers (of either printed materials or web pages) are familiar with conventional symbols. This should be clarified at an early stage, and an appropriate means of marking text agreed.
- 5.4.10 Mark-up** Use mark-up symbols and conventions according to the client's or designer's specification. This may be done on hard copy or electronically, as agreed with the client. Make appropriate use of templates, style sheets, tags, codes and other electronic processing tools.
- 5.4.11 Handwriting** On hard copy, write neatly and legibly to minimize typesetting errors due to misreading. Copy-editors should assume that they are marking up for an educated native speaker of the language in which they are working.
- 5.4.12 Pagination** Understand the use of signatures for layout and, where appropriate, adjust text to achieve even workings.
- 5.4.13 Prelim pages** Understand what is required in prelims and accurately edit or create such pages as required.
- 5.4.14 Illustrations** Where applicable, organize and relate illustrations to the text, edit labels and legends in a manner consistent with the bulk of the text and key these correctly into the text. Prepare a list of captions. Prepare artwork briefs if required, using a standard template.
- 5.4.15 Cross-references** Check the presence and correspondence of any cross-references systematically, including inconsistencies in the spelling of names in the text, bibliographical references, tables, figures and footnotes.
- 5.4.16 Index** Understand the basic principles of an index and be able to edit an index.
- 5.4.17 On-screen editing** Where applicable, be familiar with the use of computers in editing, and the principles of on-screen editing (using authors' electronic files) and web-page editing. Where applicable, make appropriate use of a computer for editing and to prepare the document for the design to be implemented. Cultivate awareness of general technological trends that may affect the editorial process.
- 5.4.18 Copyright** Draw attention to elements that require copyright acknowledgement and permission, and know how to seek permissions and prepare acknowledgements.
- 5.4.19 Legal issues** Report to the client any evidence or suspicion of matter which may contravene the laws regarding libel, obscenity, blasphemy, incitement to racial hatred or plagiarism.

5.5 Copy-editing websites

Effective website editing requires the basic skills identified in 5.4, but in addition the copy-editor may sometimes be required to do the following:

- 5.5.1 Editor's style guide** Amend or create a guide that describes the editorial style for all or part of a website.

- 5.5.2 Paragraphing** Be aware that web-page readers tend to skim-read text. This may require shorter sentences and shorter paragraphs than the equivalent printed text, separated by extra line spaces, and/or the creation of additional concise subheadings to describe the content of a paragraph or group of paragraphs.
- 5.5.3 Summarizing** Write concise descriptive headings and summaries of web pages, which can be used on higher level pages that link to those web pages or as file descriptions that would be found by a search engine.
- 5.5.4 Link writing** Rewrite sentences so that the target (internal or external) of a linked word or phrase is clear, avoiding the use of 'click here' wherever possible. Check whether the client wishes to include a disclaimer for the content of external sites.
- 5.5.5 Splitting content** Advise on the splitting of content across additional linked pages to reduce scrolling and facilitate direct access to those additional pages from elsewhere in the site.
- 5.5.6 Multimedia** Access and comment on the functionality of multimedia files integrated with web pages, e.g. audio, video, animations, and any associated text. Liaise with the author, designer or programmer, depending on the editor's content knowledge, to amend these elements.
- 5.5.7 Alternative descriptions (Alt Tags)** Write or edit text that describes graphics, other multimedia elements and links, for use when graphics are turned off or when a screen reader is being used by a visually impaired visitor.
- 5.5.8 Site mapping** Create a site map to describe all or part of a website.
- 5.5.9 Content Management Systems (CMS)** Advise on the use of a CMS to carry out editorial tasks, and check its effect on the appearance of a web page via local or remote access to a staging or development server.

5.6 Proofreading printed materials: basic skills

Proofreaders should read first proofs of an edited document against previous marked copy when provided by the client, and second and any subsequent proofs against the preceding proofs. In some cases the proofreader may be required to read 'blind', i.e. not to read against any previous copy.

A proofreader should be competent in the following skills:

- 5.6.1 Paragraphs and pagination** Ensure that page sequence within the document is complete and that illustrations are present or appropriate space has been allowed. If paragraphs are numbered, ensure that the numbering sequence is correct.
- 5.6.2 Typographical errors** Identify and correct typographical errors, e.g. misspellings.
- 5.6.3 Editor's style guide** Follow the editorial style guide (the list of spellings etc. adopted by the copy-editor and passed on to the proofreader) if provided. If this is not available, compile a style guide while reading the proofs. Do not seek to amend or 'improve' a copy-editor's work unless specifically asked to do so by the client. Errors and omissions should, of course, be corrected or queried.
- 5.6.4 Proof correction symbols** Use current British Standard proof correction symbols or terms, and colour coding for corrections (if required by the client) to permit accurate apportioning of costs.

- 5.6.5 Consistency** Identify internal textual, typographical and design inconsistencies, and query or correct as appropriate. Cross-check text with prelims and endmatter, identify inconsistencies and eliminate or query them.
- 5.6.6 Accuracy** Ensure that textual and typographical alterations, including matter brought forward and taken back, are made accurately, consistently and cost-effectively.
- 5.6.7 Illustrations** Ensure that captions correspond to illustrations and are consistent with text. Proofread labels.
- 5.6.8 Chapter and/or section titling** Ensure that titles in contents page(s) and body of the text correspond, and that page numbers correspond. Check or query cross-references and illustration numbers.
- 5.6.9 Queries** Clearly identify and list queries and refer these to the client. Ensure that queries made in pencil on the proof are circled, so that the client retains the final decision about which changes to sanction.
- 5.6.10 Running heads** Ensure that running heads are correct and correspond to the convention imposed.
- 5.6.11 Headings** Check type size, style and font used and that these are used consistently.
- 5.6.12 Fonts, alignment and line length** Identify erroneous font changes, misalignments and inappropriate line lengths, and suggest corrected formats. Check alignment of columns in tables.
- 5.6.13 Colours** If reading colour proofs, check that all colours are used appropriately and consistently.
- 5.6.14 Overall page design** Check bad word breaks and column breaks, and ensure that page depths are even; eliminate widows and orphans if required by client. In books with a complex design layout (many illustrations, tables etc.), ensure that these are placed logically and that the text can be read easily.

5.7 Collation

Proofreaders may be required to collate proof correction marks made by several individuals, e.g. author, adviser, other proofreader. Where comments are in conflict, the proofreader should be able to make justifiable judgements and amend appropriately, to maintain the required quality of the final product, the schedule, the budget and good author relations.

5.8 Proofreading websites

Effective website proofreading requires the basic skills identified in 5.6, but in addition the proofreader may sometimes be required to do the following:

- 5.8.1 Technology** Use appropriate types of software to access text, graphics and multimedia contained in any web page that forms part of the work, including browsers and plug-ins, and any agreed text mark-up software.
- 5.8.2 Page mark-up** Agree a method for marking up web pages with the client, e.g. annotating PDF copies of a page, correcting html files or marking up hard copy using conventional proof correction symbols.
- 5.8.3 Communication** Agree a method for communicating corrections or amendments to web pages with the client, e.g. by emailing marked-up files to a named contact, using FTP (a file

transfer protocol) to transfer files to a location made available for the purpose, or faxing or posting marked-up hard copy.

- 5.8.4 Navigation and page location** Ensure that any navigational controls, e.g. buttons, drop-down menus or visual representation of page location, are consistent with the site map and with page titles and/or headings.
- 5.8.5 Multimedia** Download and proofread multimedia files, e.g. animation, audio, video, against the author's or editor's brief to the designer or programmer.
- 5.8.6 Alternative descriptions (Alt Tags)** Ensure that 'alt', 'title' and 'longdesc' tags are correct.
- 5.8.7 Links** Check internal and external links.
- 5.8.8 Alternative versions** Check text-only versions of web pages or other versions of the work, e.g. PDF.
- 5.8.9 Content Management Systems (CMS)** Proofread using a CMS and check its effect on the appearance of a web page.

6 Standards of editorial project management

6.1 Scope

- 6.1.1 Brief** The project manager should, in discussion with the client, first define carefully the boundaries of his or her responsibility and obtain a brief. The project manager will need to carry out (or subcontract) many or all of the tasks listed in sections 6.2 and 6.3, but not all of these will be required in each case and the order of work may vary. The precise scope of editorial project management varies widely from client to client, and even from project to project. When a project manager is also the project copy-editor, the relevant elements of section 5 apply.
- 6.1.2 Schedule and budget** It is the project manager's responsibility to ensure that the schedule and budget are adequate for producing a work of a stated quality, and to inform the client immediately of any shortcomings and their implications.
- 6.1.3 Communication** It is the project manager's responsibility to keep in contact with the author(s), volume editor(s) or website developer throughout the project and to keep copies or records of correspondence and supporting material.

6.2 Processes involved: printed materials

6.2.1 Initial checklist

- a** *Evaluation* Inspect the received materials (hard copy and/or electronic typescript) to determine whether they are complete and conform to the contract and synopsis or to the client's stated requirements in all respects, including adequately addressing the subject, clear structure, accuracy and readability.
- b** *Content* Check the overall length of the whole work, including references, illustrations, tables, index, prelims and other elements. Check that the presentation of materials conforms to the requirements of the determined production processes: that hard copy is clean and double spaced, that electronic files are compatible with the systems to be used and that the hard copy matches the electronic files.
- c** *Irregularities* Inform the client of any omissions or deviations from the agreed brief, especially regarding estimated extent, and recommend action.
- d** *Permissions* Ensure that text and illustration permissions are sought, and that accurate acknowledgements are prepared in accordance with the terms and conditions of the permissions.
- e** *Level of copy-editing* Assess materials to determine the level of copy-editing required (see **5.1.3**) and to ensure that the schedule and budget remain adequate.
- f** *Assemble a team* Determine what jobs need to be done throughout the project and which ones will be delegated. Choose people with the relevant skills and equipment for all the delegated tasks, contact them a reasonable length of time in advance, negotiate fees within the budget, confirm the schedule for each job, and brief all team members and supply them with the necessary materials to enable them to do their jobs to the required level

of quality. Keep each member of the team informed of any alterations to the schedule throughout the duration of the project.

- g** *Revisions* Ensure that suggested changes are agreed with the author.
- h** *Prelims and endmatter* Ensure that these are compiled, arranged in the correct order and marked up.

6.2.2 Illustrations

- a** *Picture research and artwork* Ensure that the picture researcher, any other researcher and/or illustrators are briefed.
- b** *Illustrations* Ensure that all illustrations required are supplied, have the correct editorial content, and are checked for quality for reproduction.
- c** *Photography* Brief the photographer and oversee the photo shoot, if required.
- d** *Captions and legends* Ensure that the illustrations are correctly captioned and acknowledged in accordance with the conditions laid down by the copyright and/or material owner.
- e** *Originating illustrations* Send all transparencies, monochrome prints and line artwork to the originating house or pass to the client's production department.

6.2.3 Copy to typesetter or designer

- a** *Marking up* Ensure that the text is marked up for setting, on hard copy and/or electronically. Check whether the typesetter will be an educated native speaker of the language of the project and, if not, make appropriate allowance.
- b** *Designer's brief* Brief the designer or typesetter on the layout required and on any style details deviating from those already agreed.
- c** *Complete document* Ensure that the materials are complete, from prelims to endmatter, and arrange typesetting or deliver the materials to the client's production department.
- d** *Jacket or cover copy* Where applicable, prepare cover copy and arrange for cover design. Ensure that a draft copy is seen by everyone specified by the client.

6.2.4 Proofs (text plus illustrations)

- a** *First proofs* Ensure that the proofreader, author(s) and any other readers required by the client receive a set of first proofs.
- b** *Illustration proofs* Ensure that all artwork is checked against original artwork briefs, that labels (annotation) are proofread and that colours are used appropriately. Check photo proofs, which may also have to be approved by the copyright and/or material owner.
- c** *Collation* Ensure that corrections are collated onto the marked proofs (see **5.7**).
- d** *Revision* Return the marked proofs, ensuring that the typesetting package is complete.
- e** *Second proofs* Ensure that all amendments requested at first proof stage have been made correctly and that any material set since then is proofread.

6.2.5 Index and other endmatter

- a** *Index* Ensure that the index has been prepared, edited and marked up for setting and that it is sent to the typesetter, proofread and corrected on schedule.
- b** *Endmatter* Ensure that any other matter, such as acknowledgements or credits, is marked up and is sent to the typesetter, proofread and corrected on schedule.

6.2.6 Management

- a** Monitor each job at key stages to ensure that it is adequately prepared, and take any necessary action to correct errors, omissions and other shortcomings.

- b** Monitor all work to ensure that it is completed on time, within budget and to the required quality.
- c** Warn all team members of potential delays and work with them to prevent or minimize the problem.
- d** Warn the client's sales and marketing department immediately if delay is unavoidable.
- e** Initiate and maintain communications with all personnel involved in the project.
- f** Provide constructive feedback to all members of the team.

6.3 Processes involved: website materials

6.3.1 Initial checklist

- a** *Evaluation* Evaluate the materials in terms of the client's requirements, for adequately addressing the subject, for clear structure and for accuracy and readability. Bear in mind the range of visitors who will be accessing the site and identify any age, language, cultural or other barriers to understanding and accessibility.
- b** *Content* On receipt of the URL, check that the site is accessible at normal modem speeds. Check that it is clear what software or plug-ins are required to access any multimedia elements and that all such files are accessible. Confirm with the publisher what level of electronic access the likely audience for the site will have. Be aware that an alternative for multimedia files may have to be provided, e.g. still graphics in place of an animation.
- c** *Permissions* Ensure that text, graphics and other illustration permissions (e.g. audio and video clips) are sought, and that accurate acknowledgements are prepared in accordance with the terms and conditions of the permissions.
- d** *Level of copy-editing* Assess materials to determine the level of copy-editing required (see 5.1.3) and to ensure that the schedule and budget remain adequate.
- e** *Copy-editing* Agree on how this will be done, for example using original text files, an html editor, web design software or a Content Management System (CMS). Allocate copy-editing by agreement with the client. Ensure that the copy-editor has the necessary skills, connectivity, hardware and software.
- f** *Revisions* Discuss suggested changes to the style guide, page templates or navigational controls with the publisher.

6.3.2 Multimedia

- a** *Picture research* Brief the picture researcher, any other researcher and/or the artist for preparation of artwork. Confirm that the pictures will be used in a website, but check whether the client requires high-resolution images for print purposes, e.g. marketing materials.
- b** *Graphics, animations and simulations* Liaise with the author to brief the designer or programmer.
- c** *Captions and legends* Ensure that the illustrations are correctly captioned and acknowledged in accordance with the conditions laid down by the copyright and/or material owner.

6.3.3 Copy to designer

- a** *Designer's brief* Brief the designer on the layout required, and on any style details already agreed with the client.
- b** *Page templates* In conjunction with the designer, ensure that web page templates are approved by the publisher.

- c *Accessibility* Liaise with the designer on issues of accessibility to multimedia content, e.g. to make content accessible to users with sensory or motor disabilities.

6.3.4 Proofs (text plus multimedia files)

- a *Proofreading* Ensure that the proofreader and any other readers (e.g. author) required by the client receive the html files or are directed to a private URL, as appropriate.
- b *References* Where appropriate, add references to graphics or other features and ensure that credits have been made.
- c *Collation* Ensure that corrections made by the author and others to text, graphics and dynamic or interactive features are collated into the final version (see **5.7**).
- d *Second proofs* Ensure that all amendments requested at first proof stage have been made correctly, that the pages are complete and that any material added since then has been proofread. In particular, check navigation, headings, follow-on of text, correct position, size and functionality of multimedia elements.

6.4 Skills required

In order to carry out editorial project management efficiently and effectively, a project manager should be competent in the following skills:

- 6.4.1 Restructuring** Recognize when work needs restructuring. Suggest cuts and additions where necessary, or provide guidelines for the author to cut or add. Ensure that the length of the work is as specified. Recognize when prose material would be better presented in another format (e.g. table, diagram, bulleted or numbered list, animation) or vice versa. Make comprehensive notes and discuss changes with the author, or provide a list of queries for the client.
- 6.4.2 Copy-editing** Copy-edit or, with the client's agreement, allocate to a copy-editor of known competence, ensuring that house style if appropriate is followed.
- 6.4.3 Design and production** Be familiar with the skills and requirements of others involved in the production process. Have a good working knowledge of that process, including type-setting, picture origination, printing, web conventions and use of electronic tools including web design software, and be aware of the capabilities of standard multimedia authoring programs. Be aware of the implications of cuts or additions at book and journal proof stages.
- 6.4.4 Proofreading** Proofread or allocate to a proofreader of known competence.
- 6.4.5 Permissions** Recognize what is likely to be in copyright; know how to request permission to use copyright material in print and electronic formats; ensure that credits are correctly stated.
- 6.4.6 Costs and schedules** Be aware of costs, including cost implications of design requirements over and above those already budgeted for. Know the possible consequences of delays to the schedule (costs; time-collision with other projects, both client's and supplier's; sensitivity to the market).

6.5 Liaison with authors

To ensure the smooth running of the project, the project manager must be available to attend to the following:

- 6.5.1 Ongoing liaison** If required by the client to do so, liaise with the author during the period of writing or compiling the text. Respond to requests for help in tackling specific problems or general questions of coverage and organization. Monitor progress and ensure that the author is aware of both schedule requirements and those relating to presentation of material; notify the client if the deadline seems in danger of being missed.
- 6.5.2 Agreeing changes** Discuss all significant changes to the text, illustrations and dynamic or interactive elements and secure the author's acceptance or refer to the client.
- 6.5.3 Author's special requirements** Ask the author to specify any special requirements for the design and/or treatment of illustrations or other multimedia, their relative sizes and positions etc.
- 6.5.4 Proofs** Ensure that the author receives copies of proofs or access to web pages at appropriate stages and give guidance on the appropriate procedure for requesting changes, if required.
- 6.5.5 Collation** Deal with any queries and collate the author's corrections onto the marked set or proofed page, minimizing the cost of alterations wherever possible in discussion with the author. Secure the author's acceptance or refer to the client.
- 6.5.6 Blurb** Where applicable, secure the author's acceptance of blurb or refer to the client.
- 6.5.7 Disagreements with an author** If a difference of opinion with an author regarding the text or other elements remains unresolved at any stage of production, bring this to the client's attention before the text proceeds to the next stage.

6.6 Liaison with others

Direct contact with others involved in the production process (author, editor, designer, illustrator, typesetter, website programmer, webmaster) may be essential, and close contact between them highly desirable, throughout the execution of the brief. The client should be expected to introduce team members to one another as appropriate, at the earliest opportunity. Thereafter it is up to the project manager to build up a productive working relationship. As close to the outset of the project as is feasible, an appropriate method should be devised to monitor the progress of the work and to ensure that all participants deliver on time.

7 References

The SfEP takes no responsibility for the content of the sites listed below.

To access web-based information marked with an * requires Adobe Reader®, which is widely and freely available.

7.1 Training organizations

- ❑ SfEP Training: www.sfep.org.uk/pages/training.asp
- ❑ SfEP Accreditation Curriculum: www.sfep.org.uk/pages/Accred_prospectus.pdf*
- ❑ The Publishing Training Centre (PTC) at Book House: www.train4publishing.co.uk
- ❑ National Occupational Standards (also at PTC)

7.2 Personal and business finances

- ❑ Inland Revenue (income tax): www.hmrc.gov.uk
- ❑ Starting up in business: www.hmrc.gov.uk/startingup
- ❑ National Insurance:
www.hmrc.gov.uk/selfemployed/tmanational-insurance.shtml
- ❑ VAT: http://customs.hmrc.gov.uk/channelsPortalWebApp/channelsPortalWebApp.portal?_nfpb=true&_pageLabel=pageVAT_Home
- ❑ Criteria for self-employment: www.hmrc.gov.uk/employment-status/index.htm
and www.hmrc.gov.uk/pdfs/ir56.htm
- ❑ Better Payment Practice Group: www.payontime.co.uk
- ❑ Debts (see 4.2.4) – Late Payment of Commercial Debts (Interest) Act 1998, amended and supplemented in 2002:
www.payontime.co.uk/downloads/late_payment_brochure.pdf*

7.3 Health and safety in the office (see 3.1.14)

- ❑ Health and Safety Executive (HSE) website: www.hse.gov.uk/smallbusinesses/index.htm
See their booklet (www.hse.gov.uk/pubns/indg259.pdf), especially the sections on Repetitive Strain Injuries (RSI – under ‘Upper Limb Disorders’), and ‘Visual Display Units’

7.4 Contracts (see 3.2.1)

- ❑ The Society has an arrangement with FirstAssist to provide a free 24-hour telephone helpline for members and associates, who should telephone the number on the LawCare card sent to them by the SfEP.

- ❑ The Society of Indexers suggests a form for a contract: www.indexers.org.uk
- ❑ The Editors' Association of Canada publishes a sample contract with detailed checklists: www.editors.ca/hire/sfea/index.html

7.5 Copyright (see 3.1.3, 5.4.18, 6.4.5)

- ❑ Government guidance on copyright, designs, patents and trade marks: www.intellectual-property.gov.uk
- ❑ Guidance from HMSO on the use of Crown copyright material: www.opsi.gov.uk/advice/crown-copyright/index.htm
- ❑ The Copyright Licensing Agency Ltd: www.cla.co.uk
- ❑ Copyright, Designs and Patents Act, 1988: www.opsi.gov.uk/acts/acts1988/Ukpga_19880048_en_1.htm
- ❑ Duration of Copyright and Rights in Performance Regulations 1995, 1996: www.patent.gov.uk/copy/legislation/legislation.pdf*

7.6 Data Protection (see 4.4)

- ❑ Information on data protection and freedom of information issues, and guidance for individuals and small businesses: www.informationcommissioner.gov.uk
- ❑ Data protection legislation: www.hmso.gov.uk/acts/acts1998/19980029.htm

7.7 British Standard symbols (see 5.4.9, 5.6.4)

- ❑ BS 5261C: 2005 Marks for copy preparation and proof correction (extracted from BS 5261: Part 2: 2005). Can be ordered on line at www.bsonline.bsi-global.com/server/index.jsp or viewed by subscribers to BS online services.

7.8 General

- ❑ General information on publishing, with useful links: www.dti.gov.uk/industries/publishing

Index

Note: The bold locators refer to paragraphs.

A

accuracy, proofreading and **5.6.6**
acknowledgements **4.1.2f**, **5.3.1f**, **6.2.5b**
advertising services **3.1.4**
agreement of terms **3.2.1**, **4.2.1**
alignment, proofreading **5.6.12**
Alt Tags **5.5.7**, **5.8.6**
alternative descriptions in web pages **5.5.7**, **5.8.6**
alternative versions of web pages **5.8.8**
ambiguities in text **5.4.6**
animations **6.3.2b**
attachments to emails **3.1.11d**
attitude
 towards clients **3.3.1**
 towards Society, members and associates **3.3.6a**
author
 agreeing changes with **6.2.1g**, **6.5.2**
 agreeing level of edit **5.1.3**
 communication with **6.1.3**, **6.5**
 confidentiality **3.4.3**
 corrections from **6.5.5**
 disagreements with **6.5.7**
 query lists to **4.2.5**, **5.4.8**
 relationship with project manager **6.5**
 relationship with supplier **3.3.3**, **6.1.3**
 requests from **4.1.2b**, **5.3.1b**, **6.5.3**
 restructuring text **6.4.1**
 sending proofs to **6.2.4a**, **6.5.4**

B

best practice **1.2**
blasphemy **3.1.3**, **4.2.6**, **5.4.19**
'blind' reading **5.6**
blurb **6.5.6**
briefing **3.3.2b**, **4.1**, **5.3a**, **5.3.1**
 for artwork **5.4.14**
 designer **6.2.3b**, **6.3.3a**
 project management **6.1.1**
 researchers **6.2.2a**
British Standard symbols **5.4.9**, **5.6.4**
 references for **7.7**
browsers **5.8.1**
budget for project management **6.1.2**, **6.4.6**
businesses, running **3.1.13**

C

captions
 copy-editing **5.4.14**
 in editorial project management **6.2.2d**, **6.3.2c**
 proofreading **5.6.7**

chapter titles, proofreading **5.6.8**
checklist for project management **6.2.1**
 websites **6.3.1**
circumstances changing agreements **3.2.3**, **4.2.3**
client
 briefing and handover **4.1**
 definition **2.1.3**
 loyalty and confidentiality **3.4.2**, **4.4**
 professional practice **4**
 working agreement and fees **4.2**
 working relationships with editors and authors **4.3**
 working relationships with project manager **6.6**
CMS *see* Content Management Systems
coding **5.3.1c**, **5.4.10**
collation **5.7**, **6.2.4c**, **6.3.4c**, **6.5.5**
colours, proofreading **5.6.13**
column breaks **5.6.14**
communication
 between supplier and client **3.1.10**, **3.3.2a**, **5.3b**,
 5.3.2, **5.8.3**, **6.1.3**
 in editorial project management **6.2.6e**, **6.6**
 with author **6.5**
competence **3.1.5**
completion, checking for **6.2.3c**
complimentary copies **3.2.1h**, **4.2.1h**
confidentiality **3.4**, **4.4**
consistency
 copy-editing **5.4.4**
 proofreading and **5.6.5**
 structure **5.4.7**
Content Management Systems (CMS) **5.5.9**, **5.8.9**
contents page consistency **5.6.8**
continuing professional development (CPD) **3.1.2**
contracts, references for **7.4**
conventions **5.4.10**
copy-editing
 definition **2.2.1**
 in editorial project management **6.4.2**
 levels of **5.1.3**
 printed materials **5.4**
 symbols **5.4.9**
 websites **5.5**, **6.3.1e**
copy-editor
 definition **5.1.1**
 skills needed **5.4**
copyright issues **3.1.3**, **4.2.6**, **5.3.2c**, **5.4.18**, **6.4.5**
 references for **7.5**
corrections from author **6.5.5**
correspondence
 copies **3.1.9**
 security **4.2.5**
cover copy **6.2.3d**

CPD *see* continuing professional development
 crediting **6.2.5b**
 crediting supplier **3.2.1h, 4.2.1h**
 cross-references
 copy-editing **5.4.15**
 proofreading **5.6.8**

D

Data Protection Act 1988 **4.4**
 references for **7.6**
 definitions **2**
 delays **6.2.6c, 6.2.6d**
 delivery at start of job **3.2.1a, 4.2.1a**
 delivery on completion, dispatch requirements
 3.2.1b, 3.2.1f, 4.2.1b, 4.2.1f
 design
 brief **4.1.2c, 5.3.1c**
 in editorial project management **6.4.3**
 proofreading **5.6.14**
 designer
 briefing **6.2.3b**
 communication with **5.3.2b**
 copy-editing symbols and **5.4.9**
 sending copy to **6.2.3**
 sending web pages to **6.3.3**
 discussion groups **3.1.11e**
 disks
 labelling **3.1.8d**
 loss or damage **4.2.5**
 return **3.1.8c**
 dispatch requirements **3.1.9, 3.2.1f, 4.2.1f**
 web pages **5.8.3**
 disputes **3.3.3, 4.4, 6.5.7**
 documents
 confidentiality **3.4.4**
 loss or damage **4.2.5**
 undelivered **4.1.2g, 5.3.1g, 5.3.2e**
 see also original material

E

editing
 definition **2.2.1**
 on-screen **5.4.17**
 skills **5.1.1**
 standards **5**
 editor
 definition **5.1.1**
 relationships if employed **2.1.4**
 responsibilities **5.3**
 editorial intervention *see* level of edit
 electronic files *see* files
 email communication **3.1.11**
 attachments **3.1.11d**
 copies **3.1.11c**
 discussion groups **3.1.11e**
 etiquette **3.1.11d**
 web pages **5.8.3**

employee, professional practice of **3**
 endmatter **6.2.1h, 6.2.5b**
 English language competency **5.4.3**
 equipment **3.1.14**
 estimate
 of payment **3.2.1d, 4.2.1d**
 of work **3.2.1c, 4.2.1c, 4.2.2**
 expenses **3.2.1e, 4.2.1e**
 expert reader, comments from **4.1.2b, 5.3.1b**

F

factual accuracy **5.4.5**
 fee *see* payment
 feedback **4.5, 5.3c, 5.3.3, 6.2.6f**
 file transfer protocol (FTP) **5.8.3**
 files
 labelling **5.3.1e**
 management **3.1.8**
 renaming **3.1.8b**
 retention following completion **3.1.8e**
 security **4.1.6, 4.2.5**
 financial help, references for **7.2**
 fonts, proofreading **5.6.12**
 FTP (file transfer protocol) **5.8.3**

G

grammar competency **5.4.2**
 graphics in web pages **5.5.7, 6.3.1c, 6.3.2b**
 references to **6.3.4b**

H

handover **4.1**
 handwriting legibility **5.4.11**
 headings
 copy-editing **5.4.7**
 proofreading **5.6.11**
 health and safety
 legislation **3.1.14**
 references for **7.3**
 house style **4.1.2, 5.3.1, 5.4.4**
 html file mark-up **5.8.2**

I

illustrations **4.1.2e**
 caption checking **5.6.7, 6.2.2d**
 checking **6.2.2b**
 copy-editing **5.4.14**
 in editorial project management **6.2.2**
 instructions **5.3.1e**
 loss or damage **4.2.5**
 originating **6.2.2e**
 permissions **6.2.1d, 6.3.1c**
 proofreading **5.6.7, 5.6.8**
 proofs **6.2.4b**
 incitement to racial hatred **3.1.3, 4.2.6, 5.4.19**
 indemnity **4.2.5**
 index **5.4.16, 6.2.5a**

initial contact **4.1.1**

Inland Revenue, obligations to **3.1.13**

insurance against loss or damage **4.2.5**

J

jacket copy **6.2.3d**

job

content checking **6.2.1b, 6.3.1b**

delays **6.2.6c, 6.2.6d**

delivery at start **3.2.1a, 4.2.1a**

delivery on completion **3.2.1b, 4.2.1b, 5.3.2d**

description of nature of **4.1.2, 5.3a**

estimating **3.2.1c, 4.2.1c, 4.2.2, 6.2.1a, 6.3.1a**

initial contact **4.1.1**

presentation **3.1.7**

quality **3.1.12**

time for **3.1.5a, 3.1.5b**

types **2.2**

K

knowledge, inadequate **3.1.5c**

L

labels **5.4.14, 5.6.7, 6.2.4b**

language competency **5.4.3**

Late Payment of Commercial Debts (Interest) Act
4.2.4

references for **7.2**

layout, proofreading **5.6.14**

legal issues **3.1.3, 4.2.6, 5.3.2c, 5.4.19**

health and safety legislation **3.1.14**

legends **5.4.14, 6.2.2d, 6.3.2c**

level of edit **5.1.3**

application of **5.1.2**

basic skills for printed materials **5.4**

briefing **4.1.2a, 5.3.1a**

in editorial project management **6.2.1e, 6.3.1d**

relationships with authors **3.3.3**

level of proofreading **5.2.2**

libel **3.1.3, 4.2.6, 5.3.2c, 5.4.19**

line length, proofreading **5.6.12**

links in web pages **5.5.4, 5.8.7**

logo use **3.3.6b**

loyalty from client **4.4**

M

manager, professional practice **4**

manuscript

loss or damage **4.2.5**

presentation **4.1.5**

questionable material **5.3.2c**

mark-up

printed materials **5.4.10**

for typesetter **6.2.3a**

web pages **5.8.2**

market requirements **4.1.4**

members and associates

confidentiality **3.4.1**

definition **2.1.1**

professional standards **3**

relationships with supplier **3.3.6**

membership withdrawal **3.3.6c**

monitoring job **6.2.6, 6.5.1, 6.6**

multimedia **4.1.2e, 5.3.1e**

accessibility **6.3.3c**

alternative files **6.3.1b**

when copy-editing websites **5.5.6**

in editorial project management **6.3.2**

when proofreading websites **5.8.5**

N

navigation of web pages **5.8.4**

need for Code **1.2**

negotiation **4.2.2**

renegotiations **3.1.5, 3.2.3**

O

obscenity **3.1.3, 4.2.6, 5.4.19**

on-screen editing **5.4.17**

original material **3.1.9**

see also documents

orphans **5.6.14**

P

pages

depths **5.6.14**

design, proofreading **5.6.14**

location in website **5.8.4**

mark-up *see* mark-up

templates for web pages **6.3.3b**

pagination

copy-editing **5.4.12**

proofreading **5.6.1, 5.6.8**

paragraphs

proofreading **5.6.1**

in web pages **5.5.2**

payment **3.1.5a**

part-fee **4.2.2**

period **3.2.1g, 4.2.1g**

prompt **4.2.4**

proposed **3.2.1d, 4.2.1d**

PDF mark-up **5.8.2**

permissions **4.1.2f, 5.3.1f, 6.2.1d, 6.3.1c, 6.4.5**

photography **6.2.2c**

proofs **6.2.4b**

picture research **6.2.2a, 6.3.2a**

plagiarism **3.1.3, 4.2.6, 5.3.2c, 5.4.18**

plug-ins **5.8.1**

prelims **5.4.13, 5.6.5, 6.2.1h**

production, project management and **6.4.3, 6.6**

professional practice

of client or manager **4**

of supplier **3**

- professional roles **2.1**
 professional standards **3**
 progress reports **3.2.2**
 project management, editorial
 definition **2.2.1, 2.2.3**
 management needs **6.2.6**
 printed materials **6.2**
 relationship with author **6.5**
 skills **6.4**
 standards **6**
 websites **6.3**
 proofreader
 basic skills for printed materials **5.6**
 collating marks **5.7**
 definition **5.2.1**
 relationships if employed **2.1.4**
 responsibilities **5.3**
 sending proofs to **6.2.4a**
 proofreading
 definition **2.2.1, 2.2.2**
 in editorial project management **6.4.4**
 levels of **5.2.2**
 printed materials **5.6**
 skills **5.2.1**
 standards **5**
 web pages **5.8, 6.3.4**
 proofs **6.2.4, 6.5.4**
 second **6.2.4e, 6.3.4d**
 publishing, reference for **7.8**
 purpose of Code **1.1**
- Q**
- query lists
 to author **4.2.5, 5.4.8**
 copies **3.1.9**
 from proofreader **5.6.9**
 raising **5.3.2a, 5.4.5**
 questionable material **5.3.2c**
- R**
- racial hatred, incitement to **3.1.3, 4.2.6, 5.4.19**
 readership **5.4.3**
 reading 'blind' **5.6**
 reference material **3.1.14**
 references
 for further information **7**
 to graphics in web pages **6.3.4b**
 relationships **3.3**
 between supplier and client **2.1.4, 3.3.2, 4.3**
 see also communication
 remuneration for job *see* payment
 renegotiations **3.1.5, 3.2.3**
 restructuring **6.4.1**
 revisions
 checking with author **6.2.1g**
 checking with publisher **6.3.1f**
 sending to typesetter **6.2.4d**
 running heads **5.6.10**
- S**
- safety of original material **3.1.9**
 schedule **4.1.3**
 schedule for project management **6.1.2, 6.4.6**
 section titles, proofreading **5.6.8**
 security **4.1.6, 4.2.5**
 self-employed status **3.1.13**
 self-promotion **3.1.4**
 simulations **6.3.2b**
 site mapping of web pages **5.5.8**
 skills
 copy-editing printed materials **5.4**
 editing **5.1.1**
 editorial project management **6.4**
 inadequate **3.1.5c**
 proofreading **5.2.1, 5.6**
 Society
 logo **3.3.6b**
 misrepresentation by supplier **3.3.6c**
 use of name **3.3.6b**
 software files *see* files
 software for website access **5.8.1**
 spelling competency **5.4.2**
 splitting content for web pages **5.5.5**
 standards of best practice **3, 1.2**
 status of Code **1.3**
 structural level of edit **5.1.3**
 style **4.1.2c, 4.1.2d, 5.3.1c, 5.3.1d, 5.3.2e**
 see also house style
 style guide **5.4.4, 5.6.3**
 for websites **5.5.1**
 style sheets **5.4.10**
 subcontracting **3.1.12**
 subcontractors, relationships with supplier **3.3.4**
 substantive level of edit **5.1.3**
 summarizing web pages **5.5.3**
 supplier **3.3.2b**
 communication with client **3.1.10, 3.3.2a, 5.3b, 5.3.2**
 competence **3.1.5**
 confidentiality **3.4**
 crediting **3.2.1h, 4.2.1h**
 definition **2.1.2**
 independence **3.1.13**
 presentation of work **3.1.7**
 professional practice of **3**
 relationship with authors **3.3.3**
 relationship with client **3.3.2**
 relationship with Society **3.3.6**
 relationship with subcontractors **3.3.4**
 relationship with third parties **3.3.5**
 responsibility to client **3.1.6**
 self-promotion **3.1.4**
 standards **5, 5.3b**
 subcontracting **3.1.12**

symbols **7.7**

copy-editing **5.4.9**

mark-up **5.4.10**

proof correction **5.6.4**

T

tagging **5.3.1c, 5.4.10**

web pages **5.5.7, 5.8.6**

team for project management **6.2.1f, 6.6**

technical level of edit **5.1.3**

templates **5.4.10**

artwork **5.4.14**

for web pages **6.3.3b**

terms, agreement **3.2**

text mark-up software **5.8.1**

textual changes **6.2.1g, 6.5.2**

textual structure **5.4.7**

restructuring **6.4.1**

time for job **3.1.5a, 3.1.5b**

trainee supplier **3.1.5c**

training organizations **7.1**

types of work **2.2**

typesetter, sending copy to **6.2.3**

typographical errors **5.6.2**

U

undelivered material **4.1.2g, 5.3.1g, 5.3.2e**

URL checking **6.3.1b**

V

virus-checking **3.1.8a, 4.1.6**

volume editor, communication with **6.1.3**

W

website developer, communication with **6.1.3**

websites

copy-editing **5.5**

in editorial project management **6.3**

proofreading **5.8, 6.3.4**

widows **5.6.14**

word breaks **5.6.14**

work *see* job

working agreement **3.2, 4.2**

working environment **3.1.14**

references for **7.3**

This code of practice was written and prepared for publication by a subcommittee of the Society for Editors and Proofreaders.

It is intended for the guidance of editors and proofreaders and their clients.

The Society gratefully acknowledges the assistance of the many people who have contributed to the code's revision and who have read and commented on the text.

Additional copies are available from the Society (see below) or can be downloaded from the website.

© Society for Editors and Proofreaders 2005

Published by

Society for Editors and Proofreaders

Erico House

93–99 Upper Richmond Road

LONDON SW15 2TG

Tel: 020 8785 5617

Fax: 020 8785 5618

Email: administration@sfep.org.uk

Website: www.sfep.org.uk

Project management: Mary Korndorffer

Copy-editing: Sarah Patey

Design and typesetting: Naomi Laredo

Proofreading: Ruth Ogden

Indexing: Michèle Clarke