

Evidence and Evaluation Guidance Series
Population and Public Health Division

Commissioning Editorial Services: A Guide



Health

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1 Introduction

This guide is intended to assist staff of the Population and Public Health Division when commissioning editors or as a reference document when working with editors. It may also be useful to other staff within the NSW Ministry of Health.

It provides information on:

- when to commission an editor
- scoping editorial need
- levels of editing
- negotiating an editorial agreement
- working with editors
- style guides and submission requirements
- approving the content of a publication
- designing a publication.

2 When to commission an editor

Producing and disseminating publications is an important part of population and public health practice. However, using written communication to effectively engage internal and external stakeholders is increasingly challenging, due to the volume of information readers are expected to process on a daily basis. In light of this, it is important that publications communicate their message concisely and effectively.

Irrespective of whether a publication is written by staff within the Ministry, or by external authors for the Ministry, it can be beneficial to commission a professional editor to ensure that:

- the structure, expression, and design of a publication reflect its intended objective. This may involve correcting errors or inconsistencies in spelling, vocabulary, grammar, punctuation, style, layout, or anything that could distract attention from the publication's meaning or diminish a publication's credibility

- the publication is understood by readers. An editor can review a publication from the reader's perspective in terms of its emphasis, the level of its language and assumed knowledge, its overall clarity, and ensure its design, navigation tools and production format are appropriate for the way readers are likely to use it
- inclusive communication is used, including writing in a way that is consistent with commonwealth, state, and other agency requirements relating to race and ethnicity, equal opportunity, cultural diversity, gender, sexual orientation, disability, and age.

If staff consider that a publication requires professional editing, they should scope the editorial need (see Section 3, "Scoping editorial need") and seek approval from their manager to commission an editor. If approved, the normal procurement process should be followed (see Section 5, "Negotiating an editorial agreement").

The Evidence and Evaluation Branch maintains a list of freelance editors, which may assist staff during the commissioning process. The Branch can also provide informal advice to staff identifying their editorial needs.

3 Scoping editorial need

An important first step in commissioning editorial services is scoping editorial need. Taking the time to scope editorial need should make the process of procuring and managing editorial services simpler, and ensure those services meet the Ministry's requirements. During the scoping process the following should be identified:

- type of publication
- levels of editing it requires
- type of editor it requires.

Types of publication

A range of publications are produced by staff within the Ministry. The most common types of publication within the Population and Public Health Division include:

- descriptive reports of health indicators
- analytic reports of health research
- web-based reporting
- policy documents and directives
- strategic plans
- fact sheets
- submissions to peer-reviewed journals.

Phases and levels of editing

Editing can be divided into two phases:

- *Pre-production editing* includes the following levels: developmental editing and manuscript assessment.
- *Production editing* includes the following levels: substantive editing, copyediting, and proofreading.

These phases and levels are described in greater detail in Section 4 of this guide.

Depending on the complexity of a publication, all levels of editing may be required or two or three levels may be sufficient. For example, some publications will require developmental editing and/or manuscript assessment; many publications will require substantive editing; all publications will require copyediting and proofreading.

Types of editor

Depending on the publication, a range of editorial skills may be required, including:

- familiarity with the language of population and public health
- understanding scientific or technical writing and academic publishing
- ability to edit quantitative or qualitative research findings
- understanding policy writing in the public sector
- ability to convey complex information to specialist and non-specialist readers
- ability to impose a single voice on a multi-author publication.

These skills will come from two broad categories of editor:

- *Specific content editors* are familiar with population and public health. They usually have skills pertaining to epidemiology and biostatistics, health protection, health promotion, health policy, health economics, health evaluation, health surveys, or quantitative and qualitative methodologies. They may be required for pre-production editing (that is, developmental editing and manuscript assessment).

- *Generic content editors* may not be familiar with population and public health; however, they usually have skills pertaining to production editing (that is, substantive editing, copyediting and proofreading). These skills are fully described in Chapter 14 of the *Style manual for authors, editors and printers: Sixth edition*.¹

For some publications, skills from both categories may be required. In such cases, commissioning staff should discern whether a specific content editor has the required generic skills, or the generic content editor has the required specific skills. If they do not, editors from both categories may need to be commissioned.

Editors come to editing in different ways. Some have trained as professional editors; some have not. As anyone can market themselves as an editor, they should demonstrate the required skills identified for the particular publication during the scoping process.

4 Levels of editing

Generally, the levels of editing occur across two phases: pre-production editing and production editing.

Pre-production editing

During the pre-production phase, some publications may require developmental editing and/or manuscript assessment. These levels are described below:

Developmental editing

Developmental editing involves consultation with the authors before writing begins, or early in the writing process.

The developmental editor advises on organisation, approach, style, consistency of terminology, and other language-related matters. This may involve suggestions for further research, identification of useful resources, and working with the authors on outlines and plans for writing. If a draft already exists, the developmental editor may, where appropriate, recommend reordering entire blocks of text including sections or chapters.

The developmental editor does not conduct another level of editing at this stage; however, they may have an agreement to do so at a later stage.

Manuscript assessment

In the editorial process, a “manuscript” refers to any draft publication that has not yet entered production editing, whether it is a descriptive report, analytical report, policy document, strategic plan, fact sheet, or submission to a peer-reviewed journal. The manuscript assessor is the “first reader” who comments on whether a manuscript is ready for production editing or requires further development.

Manuscript assessment involves commenting on whether the writing is clear and concise, is consistent, and has a single voice. The manuscript assessor judges whether there is a logical flow between sentences, paragraphs, and sections. If the manuscript assessor has specific content skills, they should comment on whether the manuscript conforms to the conventions of scientific writing, policy writing, and academic publishing, including whether any visual material, such as tables and figures, is appropriate. The primary role of the manuscript assessor is to comment on the manuscript, rather than make changes to it.

The manuscript assessor does not conduct another level of editing at this stage; however, they may have an agreement to do so at a later stage.

Production editing

During the production phase, many publications will require substantive editing, and all publications will require copyediting and proofreading. These levels are described below:

Substantive editing

Substantive editing is also called structural, stylistic, content, or conceptual editing. The substantive editor ensures the publication is clearly and concisely written, gives a multi-author manuscript a single voice, rewrites text for sense, moves sentences or paragraphs or sections where appropriate, edits for length, removes repetitive or redundant material, ensures jargon or policy-speak or acronyms are kept to a minimum, suggests material to be added, identifies inaccuracies, provides graded

headings or regrades existing headings, creates or revises tables or figures or other visual aids for the reader, consults with the authors over issues of concern, and incorporates responses to queries and suggestions.

The substantive editor will normally provide the Ministry with a new draft for copyediting, and alert the Ministry to any copyright material that requires permission to reproduce.

The substantive editor does not conduct another level of editing at this stage; however, they may have an agreement to do so at a later stage.

Copyediting

Copyediting is also known as sub-editing or line-editing. The purpose of copyediting is to remove mistakes, inconsistencies, or anything that might confuse the readers or embarrass the authors. It is also the copyeditor’s responsibility to impose the house style on a publication. The house style is a set of editorial standards an organisation or journal uses to ensure uniformity in its publications (see Section 7, “Style guides and submission requirements”).

At this stage, the copyeditor ensures there is a logical flow between sentences, paragraphs, and sections. They also ensure there is a consistency of grammar, spelling, punctuation, capitalisation, hyphenation, use of acronyms and shortened forms, expression of numbers and quantitative information, presentation of visual material, and referencing convention, while preserving the meaning and voice of the text. It is the copyeditor’s responsibility to ensure all graded headings, and the headings of tables and figures, are sufficiently descriptive and consistent.

The copyeditor will normally provide the Ministry with a new draft for page layout, and remind the Ministry about any copyright material that requires permission to reproduce.

Before copyediting begins, all developmental editing, manuscript assessment, and substantive editing should have been completed. If any of these levels are done after copyediting, the publication may need to be copyedited again.

Proofreading

Proofreading occurs after the content of the publication has been approved by the appropriate Ministry delegate (see Section 8, “Approving the content of a publication”) and after page layout (see Section 9, “Designing a publication”). The purpose of proofreading is to ensure the house style has survived the design process and check for errors.

Proofreading is about verifying that: there are no discrepancies between the copyedited draft and the formatted proof, the publication is complete, and the standard of presentation is suitable for publication. The proofreader ensures the page layout and type specifications have been accurately followed and the line breaks, page and screen lengths, and table and illustration placements are suitable. The proofreader will also check for typographical, spelling, linking, sequencing, or other errors which may have escaped detection during the copyediting stage or may have crept in with final amendments. In the case of on-screen documents, the proofreader might also be involved in a final check to ensure everything functions as it should and any suitable metadata has been attached.¹

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Proofreading should not be confused with copyediting. It is a quality control process not a substitute for copyediting. The proofreading stage is not the time for inserting another round of author’s or editor’s changes. Changes at the proofreading stage can be expensive and time-consuming.
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5 Negotiating an editorial agreement

Once the editorial need has been scoped, and the required levels of editing are identified, the next step is negotiating an agreement for editorial services.

The agreement should specify the:

- type of publication
- levels of editing it requires
- deliverables, timetable for delivery, and indicative budget.

Most inefficiencies or failures can be traced to a poorly negotiated agreement, where commissioning staff are unclear about what is required, or an editor is unsure of what is expected.

The following should be considered when negotiating an agreement:

- because the term “editing” is vague, and means different things to different people, an agreement should avoid unclear terms such as “light” or “heavy” editing. Use terms that are easier to define and measure: developmental editing, manuscript assessment, substantive editing, copyediting, and proofreading.
- as editors may use different terms to describe these levels of editing, commissioning staff should ensure that all parties understand the levels being negotiated.
- there should always be an agreement with specified deliverables, timetable for delivery, and indicative budget. The Ministry has its own form of agreement for larger projects; an editor is likely to have their own form of agreement for smaller projects. Further information is available from the Ministry’s procurement portal at <http://internal.health.nsw.gov.au/ecsd/ssc/purchasing.html>.

6 Working with editors

Once editorial services have been commissioned, the following should be considered:

- editing is a series of consecutive and discrete levels with a logical sequence.
- it is important that each level of editing is completed prior to moving to the next level.
- returning to an earlier level of editing, once a later level has begun, is not recommended.
- there will be times when an exception to this sequence is necessary; however, the exception should not become the norm.

It is essential that Ministry staff check the edited publication, at the completion of each level of editing, to ensure it conveys its intended meaning and is ready for the next level of editing, or design, or is ready for reproduction and dissemination. Ministry staff should be aware that ongoing monitoring and engagement with editors is vital to ensure that deliverables are on track and to budget.

7 Style guides and submission requirements

When producing a publication itself, the Ministry recommends the *Style manual for authors, editors and printers: Sixth edition* as a standard reference.¹

The Style Manual provides guidance for anyone preparing material for publication, including: managers, authors, editors, designers, web-based publishers, indexers, and printers. Within Australia, the Style Manual is recognised as a standard guide to effective written communication.

When preparing a publication for submission to a journal, the Ministry recommends the *Uniform Requirements for Manuscripts Submitted to Biomedical Journals*,² a living document of the International Council of Medical Journal Editors, available online at www.icmje.org. The Uniform Requirements provide recommendations relating to specific elements of writing and editing. Using the Uniform Requirements will improve the quality and clarity of the submission and make a journal's internal editing process easier. In addition to the Uniform Requirements, each journal has its own submission specifications. Authors should obtain and follow the Instructions to Authors for their intended journal.

8 Approving the content of a publication

Once a publication has been copyedited, its content is ready to be approved for publication.

When the Ministry is producing a publication itself, whether in printed or electronic form, approval of the publication's content should be sought from the appropriate Ministry delegate prior to page layout (see Section 9, "Designing a publication").

Information about the approval process for a publication, including request for new or revised publication templates, dissemination strategies, and branding guides, can be found at the Strategic Relations and Communications Branch website at <http://internal.health.nsw.gov.au/communications>.

Before submitting a draft to a peer-reviewed journal, approval of the draft's content should be sought from the appropriate Ministry delegate.

9 Designing a publication

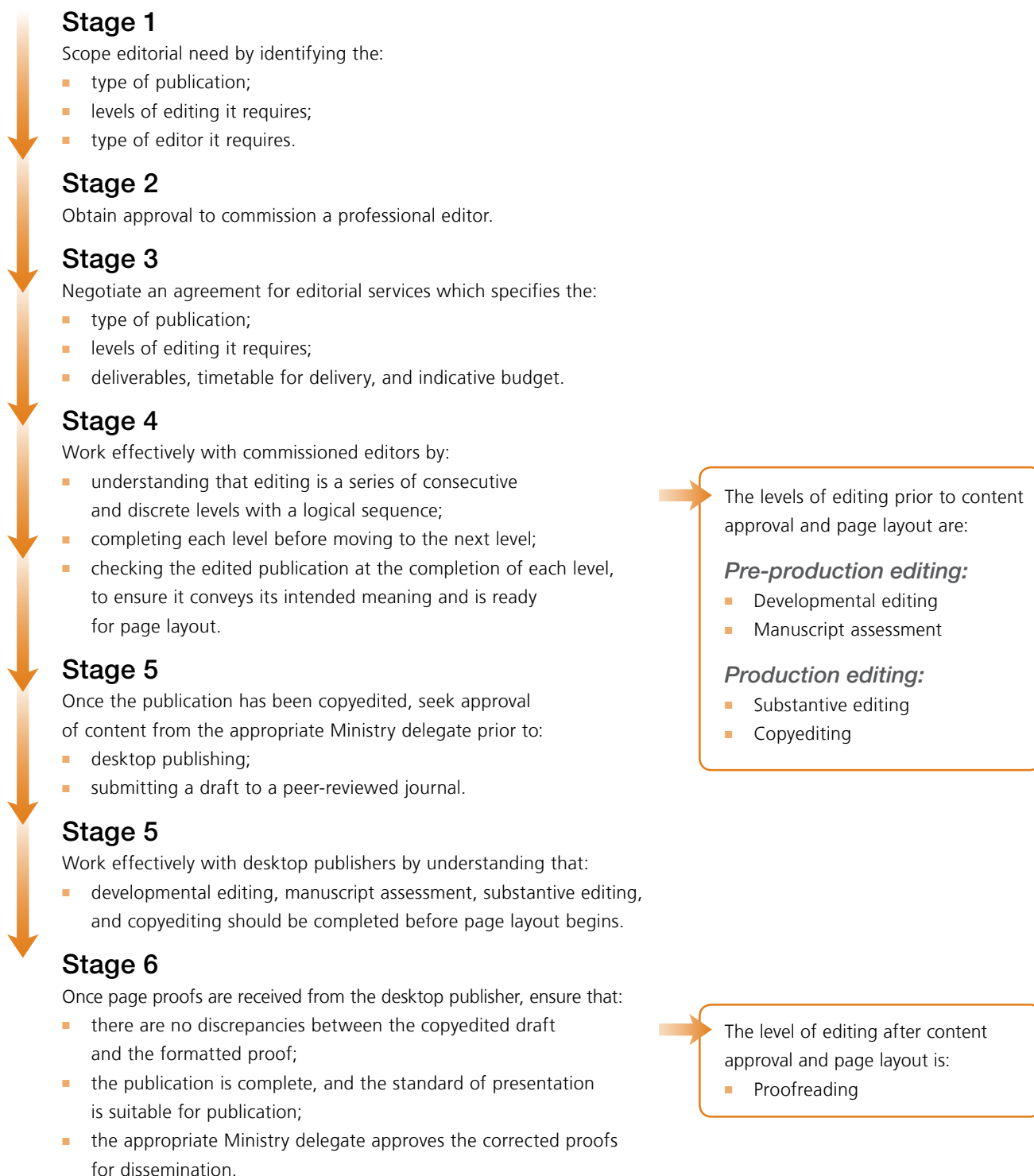
It is important for staff to remember that page layout, which is also called desktop publishing, is a discrete stage in the publishing process. As a rule, page layout:

- is not a level of editing
- is done by designers
- uses design software not writing or editing software
- occurs after manuscript assessment, developmental editing, substantive editing, and copyediting are completed and the appropriate Ministry delegate has approved the publication
- should not be used as an opportunity to look at a copyedited draft a different way and do more editorial work on it. There will be times when an exception to this rule is necessary; again, the exception should not become the norm.

Ministry staff should consider this important distinction, between editing and designing a publication, when commissioning editorial and/or desktop publishing services.

10 Summary of the editorial process

The following summary of the editorial process is intended to support Ministry staff when producing a publication.



11 Useful resources

The following resources may be useful to Ministry staff commissioning editorial services:

- *Style manual for authors, editors and printers: Sixth edition*. Canberra: Commonwealth of Australia, 2002.
- *Uniform Requirements for Manuscripts Submitted to Biomedical Journals*. International Committee of Medical Journal Editors, 2010. Available online at www.icmje.org.
- *Communicating positively: A guide to appropriate Aboriginal terminology*. Centre for Aboriginal Health, NSW Ministry of Health, 2004. Available online at www.health.nsw.gov.au/pubs/2004/aboriginal_terms.html.
- Porta M. *A Dictionary of Epidemiology*. New York, Oxford University Press, 2009.
- Last JM. *A Dictionary of Public Health*. New York, Oxford University Press, 2007.

The Evidence and Evaluation Branch maintains a list of freelance editors, which may assist staff during the commissioning process. The Branch can also provide informal advice to staff identifying their editorial needs.

Information about publishing and web services within the Ministry, including request for new or revised publication templates, dissemination strategies, and branding guides, can be found at the Strategic Relations and Communications Branch website at <http://internal.health.nsw.gov.au/communications>.

Further information about the Ministry's procurement process is available from the procurement portal on the Ministry intranet site at <http://internal.health.nsw.gov.au/ecsd/ssc/purchasing.html>.

12 References

1. *Style manual for authors, editors and printers: Sixth edition*. Canberra: Commonwealth of Australia, 2002.
2. *Uniform Requirements for Manuscripts Submitted to Biomedical Journals*. International Committee of Medical Journal Editors, 2010. Available online at www.icmje.org.

