

The Nine Tasks of an Editor

Nine hierarchical tasks enable an editor to ensure your document fulfills its intended goal

THEY RETURNED DEJECTED, AND A BIT humbled, filing slowly into their manager's office. Their manager started.

"What happened?"

"We weren't invited to present."

That was surprising. "Why not? You told me we had a great proposal, that we could clearly meet all their needs."

"We do, and we can."

"Then... what happened?"

"They rejected our proposal out of hand."

"Huh? What does that mean?"



"They told us our proposal didn't read well, that it was disorganized, wasn't clear—'fuzzy' is what they said—that it rambled, was a little redundant, had some typos, and..." the hardest part, "it didn't follow the rules of their RFP."

"I don't get it. I thought you guys had this all down pat, that you were expert." It was more a statement than a question.

"We are expert in all the technical aspects required in the RFP. But..." The pregnant pause hung in the air. "But, as we've said before, it's one thing to be technical experts, it's another thing entirely to be able to communicate that expertise clearly, concisely, and conclusively. That we struggle with."

The feeling of disappointment was almost palpable. Mildly accusatory glances circled around.

"We have a solution though." Wary eyes. "We've said this before." Wary looks. "We need an editor; it's not a luxury."

The team continued. "We've done some research (*The Levels of Edit*, Second Edition; Van Buren and Buehler of JPL). There are nine tasks an editor can do for us. We've summarized them for you."

Nine editing tasks. 1. Coordination, 2. Policy, 3. Integrity, 4. Screening, 5. Copy clarification, 6. Format, 7. Mechanical style, 8. Language, and 9. Substantive; each one substantively more comprehensive than the previous one.

1. Coordination. A coordination edit involves being the center point for the document, its additions and changes, and planning, monitoring, controlling, and scheduling of the overall job.

2. Policy. A policy edit ensures all the document parts are included and conform to any company policies and requirements (such as those stated in an RFP).

3. Integrity. During an integrity edit, an editor ensures that document parts match: table of contents are accurate, cross references to tables, figures, and the like exist, are accurate, and sequential.

4. Screening. A screening edit ensures fundamental aspects of copy editing are met and acceptable, such as contextual spelling; subject and verb agreement; missing or redundant wording; graph, figure, and table labeling; punctuation; mechanics; proper numbering.

5. Copy clarification. During a copy clarification edit, an editor ensures that everyone's contribution is complete and addresses the full scope of the intended content, and that the various contributions are presented in a parallel manner.

6. Format. A format edit ensures that the entire document conforms to a consistent look and follows any specified guidelines. It ensures consistent font usage (including correct usage of bold, italics, and other font treatments); correct typography of line spacing, leading, indents, lists, bullets, and numbers; correct application of the various head levels; correct placement and juxtaposition of text and graphics; consistent page elements; and intelligent page breaks.

7. Mechanical style. An editor ensures that document complies with all aspects of a specific style. Absent a style guide, the editor ensures conformity and consistency for textual and graphical elements. Examples include abbreviations (kilowatt hour versus kWh), spelling (catalog versus catalogue), capitalization of words in headings (initial caps versus sentence caps), symbols, compound words (non-profit or nonprofit), acronyms, and nomenclature.

8. Language. The language edit entails an in-depth review of the expression of ideas to tighten the text for clarity and readability. An editor would refine a document based on specific and identifiable reasons in such areas as spelling, grammar and syntax, word usage, fluency of transitions, parallelism of words and phrases, conciseness, correct and consistent terminology, proper use of the narrative form, gaps in logic, inconclusive arguments, and many other language-based potential stumbling blocks.

9. Substantive. A substantive edit involves the most comprehensive work by an editor in that it deals with the meaningful content of a document. An editor ensures that the document accurately reflects the topic, develops that topic fully, isn't repetitive or redundant, and doesn't include any unnecessary information. A substantive edit reviews and offers rewrites and revisions to organization, phrasing, coherence, interplay and content of text and graphics, and scope so that it fulfills the document's overall intent.

The levels of edits. An editor combines these tasks in various levels of edits, all directed toward the ultimate humanity of a document for the reader. 🌞

—RICH MAGGIANI

Solari assists utilities with creating their integrated resource plans (IRPs) through an integrated resource, distribution, and grid planning process for incorporating renewable generation.

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