IPEd.

Institute of
Professional Editors

IPEd standards for editing practice

3rd edition

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IPEd. Institute of
Professional
Editors

Australia and Aotearoa New Zealand

We acknowledge and pay our respects to Aboriginal and Torres Strait
Islander peoples as Traditional Owners, Custodians of Country and
First Nations in Australia, and to Māori as tangata whenua and
te Tiriti o Waitangi partners in Aotearoa New Zealand.

Foreword

Despite the best efforts of academies around the world, most modern languages defy containment. Unlike reassuringly dead languages such as Latin, they shift, bend and grow to fit contemporary perspectives.

Amid all this movement, how do we trace, define and assert the integrity of a global language like English? Dictionaries and style guides do some of the work, but the actual day-to-day management requires something rather special.

Enter the editor. Editors are knowledgeable people who advise and guide writers and producers to publish material of a standard appropriate to specific goals and audiences. Writing used to be a multiphase process involving different technologies and formats: longhand for notes and drafts, typing for the final manuscript, typesetting for galleys and proofs, and finally printing. This process allowed a number of points of "distancing", an invaluable step in the composition process. The author and editor could achieve several kinds and levels of objectivity as they saw the text taking shape on the page.

But, in the digital age, an author can compose at the keyboard, see a close representation on the screen of what may eventually be printed, and release the text for public consumption. All this might be done using a single set of technologies. The absence of distancing, and of the multiphase levels of composition, have reduced the level of objectivity that authors are able to apply to their outputs.

Which brings us back to the editor, who in many senses has the role of implementing distancing. And of guiding, advising and informing authors about what modern audiences expect from published content. That is why it is all the more important to have a strong, wise and structured statement about what editors do, their practices.

Enter *IPEd standards for editing practice*. I endorse this document with emphasis. It is neither a prescription nor a proscription, but a guide to a community of practice for editors. It is not an algorithmic decision machine, but a presentation of issues – how to conceptualise them, how to work with them and how to discuss them.

We begin to see that editing is very much an interactive process between authors, editors and publishers. And we recognise the editor as an interpreter – not only of content, form and language, but also of shifting reading habits and preferences.

The range of that interpretation is broadening and deepening. A very important part of the editor's role involves ethics, especially social ethics relating to culture, values, religion, ethnicity, gender identity, sexual orientation, disability, neurodiversity and body image – in fact, all aspects of diversity and inclusion.

Advocating for equity and representation in a text takes great skill when preferences vary between – and within – communities and countries where the same language is spoken. Such issues can overlap with legal matters, and are among the issues that editors need to be aware of when advising authors and publishers.

Editors are also often required to participate in, or at least understand, text design and production, involving not only words but also multimedia. They may be required to manage a whole project, and the project team, as well as their own time and resources. Editors must be equipped with knowledge and skills well beyond dexterity with language.

Editing is not for the fainthearted. But it is indispensable – to smooth out any disruptions that come through geographic or contextual variation, and to answer the cries of people desperately seeking clarity and consistency in what they read. The *Standards* is an invaluable working document for all those who care for the integrity of language and the ethical implications of publishing.

Emeritus Professor Roland Sussex OAM, FQA,

Chevalier des Palmes Académiques

Patron, Institute of Professional Editors

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Contents

Shortened forms (abbreviations and acronyms)

See glossary for further explanations

AI   artificial intelligence

alt text   alternative text

CiP   Cataloguing in Publication

DOI   digital object identifier

IPEd   Institute of Professional Editors Limited

ISBN   international standard book number

ISSN   international standard serial number

SEO   search engine optimisation

URL   uniform resource locator

Preface

The Institute of Professional Editors (IPEd) publishes *IPEd standards for editing practice* to set out the core standards that professional editors should meet. It enables a professional culture that supports editors to be champions for diversity, equity and inclusion, and values the voices of the First Nations people of Australia and the Māori people of Aotearoa New Zealand.

New editors will see the range of skills and knowledge to aspire to. The *Standards* also tells employers and clients what to expect from the editors they hire. It helps IPEd, educational institutions and other training providers to devise material, seminars and courses on editing. And it is the foundation for IPEd's accreditation scheme for editors.

This document has 5 parts:

- A. Professional practice
- B. Management and liaison
- C. Substance and structure
- D. Language and illustrations
- E. Completeness and consistency.

It includes a list of abbreviations and acronyms, and a glossary.

The standards in Part A underpin those in Parts B to E. Editors who meet these standards are able to do a professional job with minimal supervision.

The term "standard" is used here to mean "anything taken by general consent as a basis of comparison; an approved model" (*Macquarie dictionary*). *IPEd standards for editing practice* does not attempt to codify the *quality* of editors' work – how well a particular task has been performed. Rather, it aims to set out the *knowledge and skills* needed to be a professional editor.

Further, the *Standards* does not attempt to capture the full array of knowledge, skills, tasks and responsibilities that might be relevant to different editorial projects. It is genre-neutral; that is, it describes the knowledge and skills required of editors regardless of the type of material we work on or the organisational context we work in. It focuses, in a neutral voice, on core standards that apply universally to editing practice.

The *Standards* recognises that editors use a broad range of standard editorial references, including style guides and dictionaries. It is not prescriptive, as each editorial project will require references specific to the genre, purpose and audience.

IPEd publishes various resources at www.iped-editors.org that we may find useful, including the *Code of ethics, Guidelines for editing research theses, Working with self-employed editors: A guide for clients* and *Books without barriers: A practical guide to inclusive publishing*, co-published with the Australian Publishers Association. IPEd informs its members when updates and new resources are released.

The fundamentals of editing

Editing involves carefully reviewing material before it is published, and suggesting or making changes to correct and improve it.

Aspects of editing practice

The tasks we perform as editors can be grouped broadly into the following categories, although the boundaries between them can be blurred.

- **Manuscript assessment** or appraisal is reviewing material to see what editing is needed, or providing feedback on the overall content, structure and style. It does not involve making any changes, and its form is usually a letter or report.

- **Developmental editing** is working closely with the author to develop their draft content, often from an early stage. It addresses issues with themes, structure, flow, logic, characterisation and writing style.

- **Substantive editing** is assessing and shaping material to make sure its structure, content, language and style suit its intended audience. It includes and is sometimes called structural editing, which generally focuses on improving the material's overall organisation and flow. It can also include aspects of copyediting.

- **Copyediting** is editing to clarify meaning, smooth language and check for consistency, accuracy and completeness. It ensures the appropriate use of both language and illustrations, covering elements such as grammar, spelling, punctuation, tone and referencing. These tasks are sometimes completed in 2 stages, with the first pass focusing on flow and readability (line editing) before corrections to spelling, grammar and punctuation.

- **Proofreading** is examining material after layout or formatting to correct errors in textual and visual elements.

Any of these types of editing may be focused on editing for sensitivity, authenticity and inclusivity. All types of editing should involve editing for accessibility.

Not all editors work on all aspects of editing practice, and not all publications go through them all. Further, some overlap is inevitable. The exact editorial process will depend on factors such as:

- the quality of the original material
- the intended audience and purpose
- set practices within an organisation
- production methods and tools
- schedule and budget.

IPEd standards for editing practice emphasises the place of our work in the context of the entire publishing process. The practice of editing is not confined to working with specific written materials in isolation. For example, an editor's capabilities may extend to project management. And, although editors generally do not need design and layout abilities, we need to understand what designers do.

Role of editors

Editors work to balance the needs of the author, the audience and the publisher. We are part of a team that guides a work through its various stages from conception to publication. All editors need to have a broad understanding of publishing processes and our role within them, regardless of the extent of our involvement.

We have to demonstrate initiative and flexibility and be able to adapt to the needs of a project and the specific work environment. We need to communicate clearly and tactfully, use our position of influence responsibly, and respect the perspectives and opinions of others.

Editors work with many different subjects and many types of publication that require specialised knowledge and skills. Publications may be as varied as novels, reports, websites, magazines, textbooks and research materials, to name a few. We also work in many different contexts, from book editing for traditional publishing houses to advising on communication strategies in government and corporate sectors. Some editors perform tasks that extend beyond editing, such as project management, design, indexing and website maintenance.

The goal of editors, regardless of our role or the type of publication, is to ensure that:

- the material is consistent and accurate
- the publication's content, language, style and layout suit its purpose and meet the needs of its audience
- the author has considered possible ethical or legal issues.

Ethics of editing

IPEd standards for editing practice has always recognised the importance of ethics for editors as we carry out our role. The third edition amplifies this message with a renewed focus on inclusive and equitable practice. It also touches on the challenges of emerging technologies that rely on artificial intelligence (AI).

It is vital that we consider and apply a range of ethical principles – from accessibility to cultural sensitivity and safety – in both our professional interactions and the material we edit.

For example, the *Standards* calls on editors to promote and ensure access for people with disability. It also requires that we treat with care and respect the content, languages and perspectives of Aboriginal and Torres Strait Islander peoples, Māori and other First Nations peoples. For example, we need to be aware of cultural practices, preferences and commitments, such as te Tiriti o Waitangi, and seek help if our own knowledge and skills are not adequate.

As we edit, we need to use conscious language, with an awareness of its significance and impact for both the people represented in the content and its intended readers. We also need to encourage genuine engagement with these groups so the final work is inclusive, representative and fit for purpose.

IPEd's First Nations commitment

For more than 65,000 years, Aboriginal and Torres Strait Islander peoples have cared for Country across the Australian continent, maintaining rich and diverse cultures, customs and languages, with deep connections to land and sea. However, treaties do not yet exist with all state, territory or federal government jurisdictions.

The Uluru Statement from the Heart, released in 2017, makes a case for truth-telling and agreement-making between governments and First Nations. It speaks of makarrata, "the coming together after a struggle", to bring self-determination and justice for First Nations people.

This principle needs to guide our work as editors whenever a project does or should involve First Nations people, content, languages or perspectives. In particular, we need to:

- recognise the diversity of First Nations communities and knowledge systems
- call on authors and publishers to meaningfully engage with appropriate people and organisations, and contribute to that process if required
- support the inclusion of First Nations voices, collaboration and leadership
- prevent the misuse or appropriation of First Nations cultures, languages and knowledges
- build our cultural competence if it is lacking, so we can better anticipate the impact of the words we use and edit
- develop skills in working with traumatic material, especially if we are called on to help people share their personal stories, to ensure our actions are culturally sensitive and safe.

IPEd commits to:

- supporting First Nations editors to join and continue in the profession
- encouraging and helping non-Indigenous editors to become more culturally competent
- challenging policies, processes and ways of thinking that are exclusionary or harmful.

Te Tiriti o Waitangi | Treaty of Waitangi statement

Te Tiriti o Waitangi, signed in 1840, was an agreement between the British Crown and iwi and hapū Māori – Māori tribes and subtribes. Today, te Tiriti is widely accepted as a constitutional document that establishes and guides the relationship between the Crown in Aotearoa New Zealand (embodied by the government) and Māori.

In a contemporary context, te Tiriti o Waitangi also provides a strategic framework for the way in which organisations engage with Māori and consider related issues. Some of the principles and approaches that emerge out of te Tiriti are:

- **Tino rangatiratanga:** The guarantee of tino rangatiratanga, which provides for Māori mana motuhake – Māori self-determination.

- **Equity:** The principle of equity, which requires us to commit to achieving equitable outcomes for Māori.

- **Active protection:** The principle of active protection, which requires us to actively protect and support the development of Māori language, culture and identity.

- **Options:** The principle of options, to support the development of Māori modes and practices.

- **Partnership:** The principle of partnership, which requires us to work in partnership with Māori as we develop our approaches and services.

IPEd is committed to integrating te Tiriti across our organisation:
- as an employer
- with our members
- in our work.

Editors need to consider the implications of te Tiriti and te ao Māori – the Māori worldview – in all aspects of our editing practice. On Māori-specific projects, we need to partner with Māori and support Māori leadership throughout the project. Whenever appropriate, we need to:
- incorporate mātauranga Māori – Māori knowledge – into our editing
- seek Māori expertise and advice
- ensure the correct use and form of te reo Māori – the Māori language – including the spelling of place names.

A Professional practice

Editors are part of larger publishing processes. We understand the stages and the standard practices of those processes, for either print or digital content or for both.

A1 Professional knowledge and conduct

Before undertaking a project, editors should:
- ensure that we have the knowledge, skills and experience necessary to complete the work
- recognise when we need to acquire and apply specialised knowledge from other sources or professions
- be aware that we may be adversely affected by editing sensitive or trauma-based material and take steps to inform ourselves of practices in trauma-informed editing and self-care.

Regardless of our role in publishing processes or the organisational context, we should understand the following:

A1.1   Steps in publishing processes, from planning and development to production and distribution, the relationship between them and their effect on the final publication.

> For example, budgeting, user research, content production, editing, designing, indexing, print and digital production, mark-up, proofreading, testing and marketing.

A1.2   Different types of publications, their purposes and audiences, and the editing and production choices that these imply.

> Includes implications for cost, workflow, marketing and delivery.

A1.3   Components of a publication appropriate to the delivery medium, whether print or digital.

> For example, preliminary matter, body, end matter, supplementary material and metadata.

A1.4   Principles and requirements of publishing for accessibility and inclusion.

> Includes editing for people with disability, for usability and readability, and for the use of inclusive content and language.

A1.5   The need to balance time, cost and quality to suit the purpose of a publication, and the effect of choices in any of these on the final product.

A1.6   Professional conduct.

> Includes:
> - maintaining impartiality and confidentiality
> - using editing tools responsibly
> - recognising and managing conflicts of interest
> - promoting and supporting authenticity, sensitivity, diversity and inclusion.

A1.7   Standard business practices in the publishing and communication industries, whether as a freelancer or as an in-house editor responsible for contracting work.

> Includes knowledge of:
> - acceptable rates and methods of quoting
> - types of contracts and conditions
> - the different types of insurance (such as public liability and professional indemnity) and when they may be necessary.

A1.8   The need for ongoing professional development to improve and upgrade our knowledge and skills throughout our careers.

A2   Communication

Editors should have the skills to communicate clearly and respectfully with clients and colleagues. We should understand and demonstrate the following:

A2.1   Principles of clear writing.

A2.2   Principles of structuring print and digital content.

A2.3   Principles of inclusive language and conscious editing.

> Includes checking acceptable terminology and being mindful of terms that may offend or alienate.

A2.4   Principles of accessibility – the ways in which people access and absorb information.

> Includes access for a diverse range of reader needs based on elements such as:
> - format – for example, supporting assistive technologies
> - design – for example, using typography and layout to promote legibility
> - wording – for example, maximising readability with clear expression.

A2.5   Conventions of spelling, punctuation, grammar and usage in Australia or Aotearoa New Zealand, and evolving trends in language usage.

A2.6   Respective roles of editor, author and client in decision-making.

> A client, whether an individual, a group of individuals or an organisation, is the entity to which an editor is answerable for a publishing project. The client may or may not be the author.

A2.7   Respectful negotiation techniques when differences of opinion occur.

> Includes understanding when to bring in an appropriate arbiter.

A3   The publishing process

Regardless of the extent of our involvement in any type of publishing process, editors should understand the following:

A3.1   Scope of the briefing required for every step in the publishing process, whether print or digital.

> Expertise required of the publishing team may include broad-ranging tasks from research and design to writing and reviewing for accessibility and inclusivity.

A3.2   Technology used in the industry and the terminology that describes it.

> Includes awareness of the risks involved in using tools powered by AI.

A3.3   Role of the editor in a publishing project, and the importance of properly defined responsibilities, accountabilities and authorities.

A3.4   Levels of editorial intervention required for various publications.

A3.5   Stages of the editing and proofreading process, including which stages need to be repeated to ensure consistency.

A3.6   The importance of genuine and meaningful engagement with the people represented in the content. This should happen throughout the publishing process, where the knowledges, languages and cultures of those people are referenced or feature in the project.

A4   Ethical matters

Editors have an obligation to act honestly and fairly, with integrity and respect for others. In particular, our practice should recognise, respect and promote the following:

A4.1   Contribution, dignity, diversity, potential and rights of people we work and interact with.

A4.2   Equitable inclusion and representation of diverse groups, voices and perspectives.

A4.3   Diverse needs of colleagues, authors, clients and audiences.

A4.4   Specific ethical considerations in working with content that is by, for or about particular cultures and communities, or on projects that reference such content – especially Aboriginal or Torres Strait Islander peoples and Māori.

Includes:
- communication protocols
- accepted or preferred terminology
- issues surrounding cultural appropriateness and cultural appropriation
- protection of the rights of Aboriginal or Torres Strait Islander peoples and Māori as the creators and guardians of their knowledges, languages and cultures
- awareness that sensitive or trauma-based material may have adverse effects.

A4.5   Ethical practice in the use of AI.

Includes awareness of emerging issues such as:
- author confidentiality and data security
- accurate attribution of content
- introduction of bias and factual error.

A4.6   Specific ethical considerations in editing student work.

A5   Legal matters

The publisher is responsible for ensuring that a publication meets all legal requirements. However, the editor should alert the publisher at the earliest opportunity to any possible legal problems. In particular, editors should understand the following:

A5.1   Legal dimensions of the publishing process, and their implications for a publication.

Includes:
- defamation, obscenity, and discriminatory statements and language
- accessibility and inclusion
- intellectual property, plagiarism, moral rights and copyright, noting that protections vary around the world
- privacy and confidentiality
- use of AI.

A5.2   When legal advice on implications for publishing should be sought.

Includes:
- copyright and digital rights
- trade practices and trademarks
- privacy and freedom of information
- social justice, access and equity
- sub judice matters
- parliamentary privilege
- legislation specific to discrimination and cultural values.

A5.3   The information legally and contractually required to appear in a publication.

For example, the publisher's name and address, acknowledgements, credits and copyright notices.

A5.4   Legal deposit requirements and registration practices.

> For example, a cataloguing or Cataloguing in Publication (CiP) statement, international standard book number (ISBN), international standard serial number (ISSN) and digital object identifier (DOI).

A5.5   Permissions required for reproduction, the procedures and responsibilities for obtaining and paying for permission, and the limitations that such permissions might have.

A5.6   When it is appropriate to remove, amend or query material that might unfairly or unlawfully infringe another person's rights or damage their reputation.

A6   Design, typography and formatting

Editors should understand the following design, typography and formatting concepts, and recognise when professional design input is appropriate:

A6.1   Use of design elements to convey meaning, aid reading and ensure accessibility, such as for people with print disability.

> For example, use of fonts, layout and colour.

A6.2   Effect of typography and layout on ease of reading or scanning, considering different media, devices and purposes (such as print or digital publication).

> Typographical characteristics include:
> * white space, margins, and line and column widths
> * alignment
> * typefaces and fonts, including text size and weight
> * leading, kerning and tracking
> * colour
> * capitalisation.

A6.3   Requirements associated with illustrations (see D7 for a full definition) in different media.

> Includes:
> * techniques for best fit in the space available
> * correct placement in the final publication
> * use of text-based descriptions for illustrated content, such as captions and alt text.

A6.4   Appropriate use, acknowledgement and placement of any designs or artworks by Aboriginal or Torres Strait Islander people or Māori to ensure the integrity, authenticity and quality of these works.

> Requires meaningful engagement with the community involved to avoid misuse and appropriation.

A7   Tools and software for editing practice

Editors use resources to help ensure consistency and to communicate suggested changes to the client. We should be up to date and proficient in the following:

A7.1   Common word-processing software for editing.

> Includes:
> - templates and styles
> - language preferences
> - editing and proofreading mark-up (such as comments and tracked changes)
> - tables of contents
> - footnotes and endnotes
> - macros and find-and-replace functions.

A7.2   Accessibility checking tools for word processing and other office productivity applications.

> Editors may also need to use tools to check, for example, colour contrast and document and web accessibility.

A7.3   Accepted techniques for handling digital files and protecting data.

> For example:
> - transmitting and receiving files
> - scanning for viruses
> - backing up, converting and saving files
> - protecting files from unauthorised changes
> - archiving and managing version control
> - working with cloud-based software
> - understanding data protection regulations.

A7.4   Principles, requirements and limitations of software for various publishing processes, how these programs interact and whether they use AI.

> For example, tools for editing, citation management, formatting, design, digital publishing, content management, proofreading and indexing.

A7.5   Accuracy in content transfer.

> Includes identifying errors that may arise with content transferred between different types of software.

A7.6   Style guides and other references appropriate to the genre and context.

> Includes the use of in-house and other style guides, dictionaries, thesauruses and specialist references.

A7.7   Standard tools and conventions for copyediting and proofreading mark-up.

> Includes the tracked editing and comment functions used in digital formats and the symbols and terms used in print formats.

A8   Production and distribution

Different production and distribution methods bring different kinds of opportunities and problems. The more editors know about these methods, the better choices we will be able to make at all stages of the project about their suitability for a publication's readers. An editor may need to be aware of the following:

A8.1   Characteristics of different production methods.

> For example, different formats (including print, digital and audio), printing processes, types of paper and binding, and digital outputs.

A8.2   Procedures and processes for creating born-accessible publications.

> Relates to incorporating accessibility considerations into all aspects of project planning and production workflows, from conception to publication.

A8.3   Technical and accessibility requirements of a publication's chosen production method(s).

> For example, colour systems, paper sizes, screen resolutions and file sizes.

A8.4   Processes involved in finalising the content for publication.

For example, prepress, print production, digital file conversion, publishing authorisations for web content management systems and proof-checking processes.

A8.5   Processes involved in distributing the final publication to readers.

For example, across digital platforms and formats, or through distribution services, including print on demand.

A8.6   Procedures for content governance and maintenance after publication.

For example, corrections, review cycles for new editions, approval mechanisms, archiving and version control.

B   Management and liaison

Editors can be expected to undertake a range of tasks, from managing the entire publishing process to performing one very specific part of it. Regardless of the size of a publication or the extent of the editor's role, all editors need to be able to define, document and monitor a project, as well as to manage our own time and resources. We also need good communication skills, initiative, tact, perseverance, flexibility and respect for others' points of view.

B1   Project definition

To maintain a schedule, and to negotiate and keep track of changes, editors managing part or all of a publishing project should establish the following:

B1.1   Project purpose, audience, content strategy and delivery mode.

B1.2   Definition of client and lines of authority.

> A client may be an independent author, a senior editor in a publishing house, or a journal or anthology editor. Or they may be a project manager in a corporate entity, academic setting or government agency.

B1.3   Components of the publication.

B1.4   Specification of quality required, and the resources needed to achieve such quality.

> Includes the range of publishing skills and services needed, time, budget, materials, equipment and facilities.

B1.5   Publishing team members, and definitions of their responsibilities, accountabilities and authorities.

> For example, people responsible for:
> * project management
> * editing, proofreading and indexing
> * sensitivity and authenticity reading
> * design, illustration, photography, and typesetting or layout
> * permissions
> * printing or digital publishing, including prepress or file conversion for different formats
> * publicity and marketing.

B1.6   Final output required from available resources.

B1.7   Review and approval processes.

B2   Project documentation

Tasks required to complete project documentation may include preparation of the following:

B2.1   Project plan, identifying:
- work required and those who are to accomplish the various tasks
- guidelines for writing, editing and design
- equipment and facilities required
- detailed, realistic timetables
- budget and payment schedules
- approval processes
- information management systems.

B2.2   Designer brief.

> Includes extent, text and design elements, sample content and accessibility requirements.

B2.3   Content outline.

> For example, a table of contents or a high-level summary, flowcharts, storyboards, information architecture or site maps.

B2.4   Formal agreements that detail, at least:
- responsibility, accountability and authority of each party
- services and final output required
- schedule for receipt of material and handover of completed work
- methods of communication
- process for agreeing on variations
- remuneration.

B3   Monitoring

Organisation and communication in the publishing process are essential. Editors should track and record the following:

B3.1   The project's progress against budget, schedule, scope of work and required quality.

B3.2   Communication with client and team members to ensure that the team meets deadlines, contains costs and prevents problems.

B3.3   Communication with contributors or communities involved in the project to ensure that there is genuine and meaningful engagement.

B3.4   Version control of successive drafts, including sources of change.

B3.5   Formal project closure and evaluation of the extent to which the project achieved its objectives.

C   Substance and structure

Editors ensure that the form, arrangement, focus and length of a publication are suitable for its purpose. We should consider the intended audience, author's intention, available resources, medium of publication and level of editorial intervention required.

C1   Appraisal

Editors should exercise judgement in determining whether basic structures are in place, the sequence of ideas is logical and material with potential to be used for multiple formats is identified. In particular, we may need to evaluate the following:

C1.1   Suitability and quality of the original material.

> For example, text, media such as video and audio files, and interactive elements such as quizzes.

C1.2   Length, structure and focus appropriate for the purpose of the publication, intended audience and medium.

C1.3   Specific inclusions or extra content needed to address potential gaps and support readers.

> For example, a publication may benefit from an Acknowledgement of Country, a content note for potentially confronting material or language, or a warning if it contains the image or name of an Aboriginal or Torres Strait Islander person who has died. Or it might be clear that further analysis or explanation would help readers understand the author's message.

C1.4   Navigational elements for people to find their way around the publication.

> For example, accessible tables of contents, heading structures, cross-references, indexes and hyperlinks.

C1.5   Content from the publication with potential to be used for other purposes, such as promotion and marketing.

> For example, an editor may be required to draft a blurb or select text for use in promotional material.

C1.6   Requirements for publishing in multiple formats.

> For example, providing descriptions and alternative means of access (such as alt text) to the information in non-text elements.

C1.7   Additional material that may enhance a publication.

> For example, the digital version of a publication may benefit from additional content such as animations, interactive quizzes or games.

C2   Structural devices

Editors should ensure that publications are effective and suitable for the intended audience by identifying the quality required and using techniques to achieve the following:

C2.1   A complete, coherent and balanced publication, by restructuring, rewording, adding and deleting material where necessary.

> For example, consider the structural model, level of detail, prioritisation and flow of information, and need for summaries.

C2.2   A publication whose structure and content factor in cultural considerations.

> For example, formatting of dual-language publications, use of glossaries and inclusion of appropriate illustrations.

C2.3   Appropriate forms of presentation, by rewriting or reformatting material where necessary.

> For example, it may be better to present:
> - material in tabular form as part of the text
> - dialogue as narrative text
> - number-laden text as a chart or table
> - a descriptive passage as a diagram
> - a lengthy digression as dialogue or an appendix
> - extensive quotes as hyperlinks or video.
>
> Executive summaries, paragraphing, emphasis, lists and illustrations may also help to clarify the material.

C2.4   Cohesive and varied paragraphs and sentences, reordering where necessary.

C2.5   Relevant, logically graded and consistent headings and other labelling devices that are appropriate to the publication and medium, and accurately reflect the content to which they apply.

> Includes menus, buttons, hyperlinks, margin notes, headers and footers.

C2.6   Ease of navigation.

> For example, through effective information architecture, menus, cross-references and hyperlinks.

C2.7   Use of material to enhance the original content, requesting or creating new material if required.

> Includes tables, figures, glossaries, indexes, further-reading lists and embedded videos or social media posts.

C2.8   Appropriate referencing.

> Includes citations, bibliography, list of references, endnotes, footnotes, margin notes and cross-references.

C2.9   Effective summaries to help readers understand a publication's content.

> For example, adding tables of contents, lists of figures and abstracts.

C2.10   Detailed and relevant metadata to aid discoverability.

> For example, titles, descriptions or abstracts, author biographies, endorsements and keywords.

D   Language and illustrations

Editors ensure that the elements of a publication are suitable for its purpose. We take into consideration the intended audience, author's intention, available resources and type of publication.

D1   Clarity

A major purpose of editing is to make the mechanics of presentation inconspicuous so as not to distract the reader. Editors should know the following:

D1.1   Principles of clear expression.

> For example, simplifying complex words and sentences, eliminating wordy or repeated phrases and using other plain language techniques.

D1.2   The need for clear and logical connections between phrases, clauses, sentences, paragraphs and sections.

> For example, using subordinate structures for subordinate ideas, replacing negative constructions with affirmative ones and employing parallel grammatical structures to create smooth links.

D1.3   Punctuation to ensure clarity of meaning and ease of reading.

D2   Voice and tone

In improving a sentence, paragraph or passage, editors should change only what is necessary to establish and preserve consistency in the following:

D2.1   Reading level, degree of formality (register) and use of terminology appropriate to the type of publication and audience.

D2.2   Voice (or voices), colour, tone and pace.

> Refers to the level and style of language appropriate to the nature of the material and its audience. Alternatively, especially in fiction, it refers to the representation of characters through the style of language ascribed to them.

D3   Inclusive language

Editors should edit consciously and promote the principles of inclusive language, always alert to our own cultural biases. We should be aware of discriminatory or biased terms and guide authors on how to avoid them. In particular, we should consider the following:

D3.1   The likely impact of language choices on specific communities of readers, especially the potential for terms to cause harm or offence.

D3.2   Evolving usage.

> Includes words that are being reclaimed by the communities they were once used against as slurs, and words that are now recognised as harmful.

D3.3   When to seek help with language and topics that extend beyond our expertise.

> Help may be sought from authenticity readers, sensitivity readers or other suitable professionals.

D4   Grammar, spelling, punctuation and style

Editors should bring consistency and accuracy to a text, without introducing errors or altering the intended meaning. Conventions may vary with genre, and authors may choose to depart from them, but we should be aware of current practice relating to the following:

D4.1   Grammar, syntax, and word choice and usage.

> For example, being able to identify subject–verb disagreements, dangling modifiers or words that have been incorrectly used in a sentence.

D4.2   Spelling and punctuation.

D4.3   Use of other orthographic elements, including:
- upper and lower case
- emphasis, such as italics, bold and underline
- shortened forms, such as acronyms, initialisms and contractions.

D4.4   Expression and formatting of:
- numbers, such as dates, percentages, measurements, symbols and statistical data
- lists
- citations for sources and quoted material.

D5   Official, recognised and other languages

Editors working on content primarily in one language may encounter other languages within that content. We should know the following in such instances:

D5.1   The official language(s) in the country of publication, and what is required when editing these language(s).

> For example:
> - understanding the meaning of te reo Māori as a taonga – treasure – under te Tiriti o Waitangi
> - te reo Māori spelling, punctuation and diacritic conventions
> - important cultural perspectives, principles and values associated with te reo Māori and Māori culture and identity.

D5.2   The recognised languages in the country of publication, and what is required when editing these languages.

> For example, in Australia, First Nations content may include various languages and dialects, Aboriginal English, Kriol or Torres Strait Creole.
>
> Editors need to be familiar with spelling, punctuation and diacritic conventions, including acceptable variations. We also need to know important cultural perspectives, principles and values associated with these languages and cultures.

D5.3   How to approach languages other than the official and recognised languages of the country of publication within English text.

> Includes knowing if and when to use italics, and how to treat the English translations of such material.

D5.4   When to seek help from suitable guidelines and professionals if we are not proficient in the language of the material we are editing.

D5.5   When to seek help in the use of specific languages and in reference to culturally sensitive or region-specific words, practices and topics.

> Help may be sought from authenticity readers, sensitivity readers or other suitable professionals.

D6   Specialised material

Punctuation, spelling and word choices in specialised material should be defensible and coherent. Editors working with such material should have relevant knowledge and skill in the following:

D6.1   Forms and protocols associated with the language and display of specialised material.

> Includes fiction, poetry, music, drama, academic writing, government reports, legal documents, web content, and mathematical and scientific material.

D6.2   The extent to which an academic thesis or assignment may be edited, and the nature of the edit.

> In addition to IPEd's *Guidelines for editing research theses*, editors need to be aware of relevant guidance, including universities' own guidelines and any government legislation on editing student work.

D6.3   Technical and specialised terms, with the ability to clarify them for the intended audience.

D6.4   Conventions for expressing foreign and historical currencies and units of measurement, and methods of conversion.

D6.5   Diacritics and other letter conventions.

> Includes accents, underlining, digraphs, macrons/tohutō, ligatures (tied letters) and romanisation systems.

D6.6   Techniques available to help potential readers to find web content, such as search engine optimisation and microcopy.

D6.7   Techniques for working with specialist technologies.

> Includes braille, tactile graphics and other assistive technologies.

D7   Illustrations and tables

"Illustrations" is used in the widest sense to include all non-text elements in print and digital publications. These might be drawings, graphs, maps, photographs, slideshows, video clips and/or multimedia files. Editors should know the following:

D7.1   Type, quantity and style of illustrations and tables appropriate to a publication.

> Includes the use of interactive elements in digital materials.

D7.2   Technical quality of illustrations and tables in different formats.

> Includes resolution, clarity, file size and tonal contrast.

D7.3   Accessibility requirements.

> Includes requirements for people with print disability and those using assistive technologies, such as the inclusion of alt text.

D7.4   Principles of presenting information in visual form, including positioning illustrations and tables effectively and making their presentation consistent.

D7.5   Conventions governing the use of:
- tables, including the principles of clear, logical and accessible layout
- graphs or charts and their elements, such as axes, scales and labels
- maps and their elements, such as labels, boundaries, contours, scales, legends and orientation.

D7.6   Requirements for creating captions, and the need for permissions and acknowledgements.

D7.7   Need for cultural appropriateness, inclusivity, diversity and sensitivity in illustrations.

E   Completeness and consistency

Editors ensure that elements of a publication are complete, consistent and correctly placed. We also check digital publications for accessibility, usability and functionality.

E1   Integrity

To ensure that a publication is complete and consistent, editors should check the following:

E1.1   Completeness of the various components of a publication, ensuring that they are accurate and in proper sequence.

E1.2   Accuracy and accessibility of cross-references, citations and hyperlinks:
- between the contents page and the headings, text and page numbers
- between the list of illustrations and the illustrations in the text
- between the list of tables and the tables in the text
- within the text
- between the text and the illustrations and tables
- between the in-text citations and the reference list or bibliography.

E1.3   Usability and functionality of digital content, by reviewing:
- navigation, including structure, hyperlinks and menus
- all interactive elements
- accessibility.

E2   Textual elements

To ensure the language and internal structures of the text are consistent, accurate and complete, editors should use the following tools and techniques:

E2.1   Style guides and other resources, such as dictionaries.

E2.2   An editing style sheet specific to the publication to ensure a consistent approach to textual elements such as:
- spelling, grammar, punctuation, capitalisation, hyphenation, abbreviations and italics
- numbers (including measurements, time, dates and percentages), symbols and equations

- lists (including structure, grammar and punctuation)
- heading hierarchy
- chronology, descriptions, names and terms
- alphabetical and numerical sequences.

  Alphabetical sequences apply to bibliographies, glossaries and indexes. Numerical sequences apply to chapters, sections, pages, notes, illustrations and tables.

E2.3   Fact checks for internal consistency or against reputable sources.

E2.4   Checks for consistency, accuracy and completeness of:
- symbols, terms and shortened forms
- lists, including contents, tables, illustrations, abbreviations and dramatis personae
- all forms of referencing, including acknowledgements, citations, margin notes, footnotes, endnotes, cross-references, URLs, hyperlinks, bibliographies, lists of references, glossaries and indexes
- all copy for preliminary matter, headers and footers, covers and spine.

E3   Illustrations and tables

Editors should understand what can and cannot be done with illustrations and tables. At a minimum, we should ensure that a publication presents the following:

E3.1   Illustrations and tables, where required, that are consistent, accurate, complete and relevant.

  Includes captions, labels and legends; for digital content, also includes the content of buttons, hyperlinks and image descriptions.

E3.2   Consistency between text and non-text elements.

E4   Format, layout and production

Editors should be familiar with proofreading and quality assurance strategies to check the following elements:

E4.1   Format and layout against design specifications.

> Includes:
> - type sizes and styles
> - line lengths, alignment and leading
> - heading hierarchy
> - weights of rules (such as table grids and borders).

E4.2   Layout to correct problems.

> Includes:
> - widows and orphans
> - rivers of space
> - awkward breaks in words, lines, tables and lists
> - incorrect placement of design features and illustrations.

E4.3   Page numbers, headers and footers.

E4.4   Page and production proofs, and binding in print publications.

E4.5   Technical integrity of digital publications, especially when part of a conversion process.

> Includes:
> - file validation and checking
> - metadata
> - the accessibility and usability of cross-referencing, non-text elements and interactive content such as videos and charts.

Glossary

Note: Terms used in specific standards are cross-referenced; those without a cross-reference appear in the preliminary pages. Italicised terms are defined elsewhere in the glossary.

Aboriginal English: Indigenised variety of English spoken widely by *First Nations peoples* across Australia, largely an oral language, particularly used in storytelling, yarning and dialogue (D5.2). See also *Kriol*, *First Nations language*, *Torres Strait Creole*.

accessibility: Ease of information retrieval (A1.4, A2.3, A3.1, A5.1, A6.1, A7.2, A8.2, B2.2, D6.3, E1.2, E1.3, E4.5). **1.** Technological access, as through a network or the internet. **2.** Cognitive access, such that information is easily read. **3.** Ease of access for people with print disability. See also *born-accessible publication*, *functionality*, *print disability*, *usability*.

Acknowledgement of Country: Statement that shows awareness of and respect for the Traditional Custodians of Country in Australia, and their long and continuing connection to land, waters and culture. Unlike a Welcome to Country, it can be offered by an Indigenous or non-Indigenous person.

alt text: Alternative text that provides a basic description of an *illustration* (other than a purely decorative image) or table to ensure *accessibility (def. 3)* (A6.3, E3.1). See also *image description*.

alternative text: See *alt text*.

artificial intelligence (AI): Simulation of human intelligence processes by computer systems and software (A3.2, A4.5, A5.1, A7.4).

assistive technology: Any item, piece of equipment, software program or product system (such as screen-reading software and braille) that increases, maintains or improves the functional capabilities of people with disability (A2.4, D6.7, D7.3).

authenticity: Material that is true to the subject (A1.6, A6.4, B1.5). When authors write about something they are not familiar with – for example, a place, experience or culture – an *authenticity reader* can check that the writing accurately reflects that place, experience or culture and does not reflect bias.

authenticity reader (or editor): Reader (or editor) with lived experience or specialist knowledge who is engaged to provide feedback about the *authenticity* of a piece of writing (B1.5, D3.3, D5.5). See also *sensitivity reader (or editor)*.

blurb: Short synopsis of a creative work often printed on the back cover as a marketing tool. May also refer to author blurb, or short biography (C1.4).

body: Material that follows the *preliminary matter* and precedes the *end matter*, which may be organised into parts, chapters, sections and subsections; may include illustrations, captions, labels and notes (A1.3).

born-accessible publication: Digital publication that is designed from inception to be accessible to all readers. The digital master file can also be used to generate other formats (including print, large print and braille) with minimal remediation (A8.2). See also *accessibility*.

Cataloguing in Publication (CiP) statement: See *cataloguing statement*.

cataloguing statement: Statement on the *imprint page* of a publication that a prepublication record is available from the National Library of Australia or Aotearoa New Zealand (A5.4); replaces previous Cataloguing-in-Publication (CiP) data in Australia; called a Cataloguing in Publication (CiP) statement in Aotearoa New Zealand.

citation: Notation used to acknowledge and identify the source of a quote, idea, image or other information referred to in a work; includes footnotes, endnotes and abbreviated forms such as author–date (A7.4, C2.8, D4.4, E1.2, E2.4). See also *reference*.

colour: Richness and depth of writing that lifts it above the everyday (D2.2).

copyediting: Editing to clarify meaning, smooth language and check for consistency, accuracy and completeness (A7.7); includes or is sometimes known as *line editing*.

copyright: Legal concept giving the creator or commissioner of an original work exclusive rights to it (A5.1, A5.2, A5.3). See also *digital rights*, *moral rights*.

credit: Acknowledgement of a source, as an in-text reference, as part of a caption or in a list in *preliminary matter* or *end matter* (A5.3).

cross-reference: Notation, direction or link internally or to another text or part of a text (C1.4, C2.6, C2.8, E1.2, E2.4).

cultural appropriateness: Sensitive and respectful use of material from different cultures (A4.4, D7.7).

cultural appropriation (or misappropriation): Adoption of the customs, practices and ideas of one people or society by members of another and typically more dominant people or society in an exploitative, disrespectful or stereotypical way (A4.4).

cultural safety: Environment where the author feels that their cultural identity is seen and heard positively by the editor during the editing process.

cultural sensitivity: Knowledge and acceptance of cultural differences and identities (D7.7).

dangling modifier: Word or phrase (often a participle) that modifies a noun that is implied but missing (D4.1).

defamation: Written or spoken statement that damages a person's or an organisation's reputation (A5.1).

design elements: Fundamental aspects of any visual design, which include shape, colour, space, form, line, value (lightness or darkness of a colour) and texture, used to enhance meaning and bring clarity to print and digital content (A6.1, B2.2).

developmental editing: Working closely with an author to develop their draft content, often from an early stage. It addresses issues with themes, structure, flow, logic, characterisation and writing style.

diacritic: Symbol added to a letter in a word, such as the various types of accent, which affects its pronunciation (D4.1, D4.2, D6.5).

digital content: Any material that is accessed by an electronic device. It may be published as a website, app (application) or ebook, or for use with assistive technologies (A2.2, A6.2, E1.3, E2.4, E3.1).

digital object identifier (DOI): Series of numbers and punctuation that identifies a document. Unlike a URL, a DOI always stays the same. DOIs are also internationally standardised (A5.4).

digital rights: Creator's or publisher's *copyright* of a digital product (A5.2).

disability: Result of the interaction between people living with temporary or permanent health conditions and the barriers to equitable participation they experience in the physical and social environment (A1.4). See also *print disability.*

discoverability: Degree of ease with which information about the elements and features of a publication can be found (C2.10). See also *metadata.*

discriminatory language: Words and phrases used to exclude, persecute or treat people or groups unfairly on the basis of common characteristics (A5.1).

diversity: Range of human differences and the characteristics that make each person unique. It incorporates race, colour, gender and gender identity, sexual orientation, age, religion, political beliefs, social class, physical and cognitive ability, and any other characteristic that may be used to identify a person (A1.6, A4.1, D7.7). See also *inclusion, inclusive content.*

dramatis personae: List of main characters in a dramatic work (E2.4).

end matter: Material that follows the last page of the *body*; may include glossary, appendixes, reference list or bibliography, and index (A1.3).

equity: Quality of being fair or impartial, recognising that we do not all start from the same place and need to acknowledge and adjust imbalances.

First Nations language: In the Australian context, any one of the many Aboriginal and Torres Strait Islander languages or language groups, such as Warlpiri and Gurindji (Northern Territory), Wik Mungkan and Meriam Mir (Queensland), Nyikina and Kukatja (Western Australia), Wiradjuri and Gumbaynggirr (New South Wales), Budawal and Bangerang (Victoria), Arabana and Ngarrindjeri (South Australia), and palawa kani (Tasmania). Some languages remain strong, some are no longer actively spoken and some are being revived (A3.6, A4.4, C2.2, D5.2, D5.4, D5.5). See also *Aboriginal English, Kriol* and *Torres Strait Creole.*

First Nations peoples: Broad description of any indigenous peoples worldwide; in the Australian context, the many Aboriginal and Torres Strait Islander groups, each with its own Country, language or dialect, culture, law and spirituality.

font: Variations in the size, weight, width, colour and design of the characters of a typeface (A6.1, A6.2). See also *typeface.*

format: 1. Shape and size of a book (C1, C1.6). **2.** Particular way information is coded for computers (A7.4, A8.5). **3.** Particular design elements, list *styles (def. 1)* and type *styles (def. 3)* used in a publication (A2.4, A6, E4, E4.1). **4.** Medium of publication (A7.7, A8.1, A8.5, B1.5, C1, C1.6, D7.2).

functionality: Performance of a digital publication on different devices, platforms and browsers (E1.3). See also *accessibility, usability.*

hapū: Māori kinship group, subtribe.

hyperlink: Electronic link in digital content that provides direct access from one place in a publication to another place in the same or another publication (C1.4, C2.3, C2.5, C2.6, E1.2, E1.3, E2.4, E3.1).

illustration: Any non-text element in print and digital publications, such as drawings, tables, graphs, icons, maps, photographs, slideshows, video clips and multimedia files (A6.3, B1.5, C2.2, C2.3, D7, D7.1, D7.2, D7.4, D7.7, E1.2, E2.2, E2.4, E3, E3.1, E4.2).

image description: Written description of non-textual material for readers who access publications through hearing or touch rather than sight (E3.1). An *alt (alternative) text* description provides a brief overview of the essential details in the image or table. For complex diagrams, a long description may follow the *alt text* to provide more detailed information. As not all programs provide a separate window for long descriptions, they may need to be stored elsewhere, such as in an appendix or separate file, and accessed through a link provided in the *alt text.*

imprint page: Page usually within the *preliminary matter* that gives publishing information, such as publisher, printer, copyright and cataloguing references.

inclusion: Act or practice of including and accommodating people who might otherwise be excluded or marginalised, for example, because of their race, gender, sexuality or ability (A1.4, A1.6, A4.2, A5.1). See also *diversity, inclusive content.*

inclusive content: Content that speaks to a broad and diverse audience without excluding anyone (A1.4). See also *diversity*, *inclusion*.

information architecture: Structure of content, especially *digital content*; includes organisational, labelling, search and navigation systems (B2.3, C2.6).

information management system: System that controls drafts, records, file naming, tracking and marking up changes, and backing up and archiving content (B2.1).

intellectual property (IP): Original material produced by a writer or other creator that is protected by *copyright* law (A5.1).

interactive element: *Digital content* that requires active engagement rather than passive participation (C1.1, C1.7, D6.7, E1.3, E4.5).

international standard book number (ISBN): Unique number that identifies the language, publisher, title, country and medium; a part of a worldwide system of cataloguing books (A5.4).

international standard serial number (ISSN): Series number; part of a worldwide system of cataloguing journals and other series of publications (A5.4).

iwi: Māori tribe or extended kinship group (A4.4).

kerning: Customised spacing between 2 particular letters, often used to distinguish similar letters (A6.2). See also *tracking*.

Kriol: Non-traditional, rule-driven creole language used by *First Nations peoples* across northern Australia, from the eastern regions of the Northern Territory to the western Kimberley (D5.2). See also *Aboriginal English*, *First Nations language*, *Torres Strait Creole*.

leading: Spacing between lines of text (A6.2).

legal deposit: Legal requirement to lodge all published works in the National Library (and printed works in state and territory libraries) in Australia, and in the National Library of New Zealand (A5.4).

line editing: Aspect of *copyediting* that focuses on clarity, flow, voice and readability.

macro: Tool that automates procedures in applications such as word-processing software (A7.1).

mana motuhake: Te reo Māori term for separate identity, autonomy, self-government, self-determination, independence, sovereignty, authority – mana – through self-determination and control over one's own destiny.

manuscript assessment: Reviewing material to see what is required from the editing process, or providing feedback on the overall content, structure and style, without implementing any changes; also known as manuscript appraisal.

mark-up: Act of marking corrections and layout instructions in textual and visual content (A1.1, A7.1, A7.7).

mātauranga Māori: Māori knowledge in its most expansive and all-encompassing form; the body of knowledge originating from Māori ancestors, including Māori world views and perspectives, Māori creativity and cultural practices.

metadata: Data that provides information about other data, such as keywords, tags, file size, ownership and date created (A1.3, C2.10, E4.5). See also *discoverability.*

microcopy: Small bits of text on websites, applications and products that help users, such as error messages, instructions on how to enter payment details and explanatory text on forms (D6.6).

moral rights: Rights of creators of works that are protected by *copyright* law (A5.1).

navigation element: Features of digital content that provide navigation links (such as menus and breadcrumb trails that allow users to track their location), indexes or tables of contents (C1.4).

non-text element: Any part of a publication that conveys information using a format other than text, such as photographs, videos, maps, slideshows and tables (C1.6, D7, E3.2, E4.5).

office productivity application: Computer applications that facilitate writing, modifying and viewing electronic files (A7.2).

official language: Any language given official recognition in a country, state or jurisdiction; may be official de jure (through legislation) or de facto (by custom, common usage). The de facto official language of both Australia and Aotearoa New Zealand is English. Aotearoa New Zealand also has 2 de jure official languages – te reo Māori and New Zealand Sign Language (D5.1, D5.3).

orphan: Typographical issue where the first line of a paragraph appears at the bottom of a page or column and is therefore separated from the rest of the paragraph (E4.2). See also *widow.*

orthographic element: Feature that contributes to the writing system of a language and helps readers to interpret meaning. Orthographic elements include spelling, punctuation, capitalisation and hyphenation (D4.3).

pace: Speed at which the writing achieves its objectives, based on the writer's stylistic choices (D2.2).

parallel grammatical structure: Consistent use of a grammatical form for equal clauses within a sentence or for items in a list (D1.2).

plagiarism: Appropriation or close imitation of other people's writing or ideas without acknowledgement (A5.1).

plain language: Use of wording, structure and design so clear that the intended readers can easily find what they need, understand what they find and use that information (D1.1).

preliminary matter: Material that precedes the first page of the *body*, which may include title page, *imprint page*, dedication, foreword, contents, lists of illustrations and abbreviations, preface, acknowledgements, abstract and summary; commonly known as the "prelims" (A1.3, E2.4).

prepress: Preparation for printing.

print disability: Result of the interaction between people living with visual, physical or perceptual conditions and the barriers to reading they may experience when content is made available in print form only (A6.1).

printed content: Any material that is accessed through a physical publication, such as a book, newspaper or brochure (A2.2, A6.2).

print on demand: Printing technology that allows books and other products to be printed when needed, even in small quantities (A8.4).

proof: Typeset, laid-out or formatted version of content for final review before publication (E4.4).

proof checking: Checking of various types of proof while finalising content for publication (A8.4).

proofreading: Examining material after layout or formatting to correct errors in textual and visual elements (A1.1, A3.5, A7.1, A7.4, A7.7, E4).

recognised language: Any language not deemed *official* but with special status in a country, state or jurisdiction, such as the languages of *First Nations peoples* in Australia and of Pacific peoples living in Aotearoa New Zealand (D5.2, D5.3).

reference: 1. Note, commonly presented in a reference list or bibliography, containing bibliographic details, such as the name of author and publisher, that enable users to find books, articles and other sources of information referred to in a work (C2.8). **2.** A compendium of specialist information, such as a style guide (A7.6). **3.** A notation or instruction used to direct users to other parts of a work (C1.3, C2.6). See also *citation, cross-reference.*

register: Formality and *tone* of a piece of writing based on a combination of grammar, word choice and expression (D2.1).

representation: 1. Equitable participation of members of marginalised groups in decision-making bodies (A4.2). **2.** Adequate and authentic depiction of marginalised groups in publications (A4.2, D2.2).

rivers of space: Typographical issue where gaps in typeset letters or words form continuous blank space, or "rivers", in a section of text due to the coincidental alignment of blank space (E4.2).

search engine optimisation (SEO): Process that makes web content more visible to search engines (D6.6).

sensitivity: Awareness of potential issues in a piece of writing that could cause harm or offence, particularly to marginalised readers, such as cultural biases, stereotypes, inaccuracies or other misrepresentations. (A1.6, D7.7). See also *authenticity.*

sensitivity reader (or editor): Specialist who is engaged specifically to read (or edit) work to identify *sensitivity* issues (B1.5, D5.5). See also *authenticity reader (or editor)*.

specialised knowledge: Knowledge gained through training, study, experience or profession that is in addition to the competencies and skills expected of a professional editor. For example, an editor may have specialised knowledge in the field of music, which may make them desirable as an editor for content about music (A1.8).

structural editing: Aspect of *substantive editing* that focuses on the organisation of material and the types of elements included to clarify meaning and improve flow.

style: 1. Decisions made about punctuation, capitalisation, spelling, formatting of lists and tables, presentation of numbers, abbreviations and so on that are applied consistently throughout a document or series, usually through a *style sheet* or *style guide* (A7.1, A7.6, D4, D7.1, E2.1, E2.2). **2.** The nature and tone of written materials; see also *voice* (D2.2). **3.** Type formatting (size, *font* and so on) for elements of a publication that are applied consistently through a style template or design brief (D7.1, E4.1).

style guide: Resource that details points of editorial *style* for authors and publishing professionals; may be developed for in-house use or published for more general use; sometimes known as a style manual (A7.6, E2.1).

style sheet: List, usually alphabetical, developed by an author while writing or an editor during an edit, detailing points of editorial *style (def. 1)* for a particular publication or series (E2.2).

substantive editing: Assessing and shaping material to make sure its structure, content, language and style suit its intended audience. It includes *structural editing* and can include aspects of *copyediting*. See also *developmental editing*.

supplementary material: Part of a publication provided to complement or enhance the body text, including *non-text elements*, additional text elements and links to *digital content* (A1.3).

syntax: Order or arrangement of words or phrases in sentences (D4.1).

tactile graphics: Representations of images that use raised lines and surfaces to convey non-textual information. While a tactile graphic is not an exact reproduction of a print graphic, it delivers an equivalent level of information to that in the visual image that people with low or no vision can feel (D6.7).

tangata whenua: Literally, "people of the land", indigenous people of Aotearoa New Zealand.

taonga: Te reo Māori term for a socially or culturally valuable object, resource, phenomenon, idea and technique; treasure (D5.1).

te ao Māori: The Māori world.

te reo Māori: Māori language, an official language of Aotearoa New Zealand (D5.1).

tino rangatiratanga: Te reo Māori term encapsulating self-determination, sovereignty, autonomy, self-government, domination, rule, control, power.

te Tiriti o Waitangi: Māori-language version of a treaty signed in 1840 and widely accepted as a constitutional document establishing and guiding the relationship between the Crown in Aotearoa New Zealand (embodied by the government) and Māori (D5.1). See also *Treaty of Waitangi*.

tone: Author's presence in the text and their manner of relating to the reader, depending on the nature of the text (such as populist work vs academic) (D2, D2.2). See also *voice*.

Torres Strait Creole (Yumplatok): Non-traditional, rule-driven creole language used by *First Nations peoples* of the Torres Strait (D5.2). See also *Aboriginal English*, *First Nations language*, *Kriol*.

tracking: Consistent spacing between each letter and word in a selection of text, used to contract or expand the amount of text on a line (A6.2). See also *kerning*.

Treaty of Waitangi: English-language version of a treaty signed in 1840 and widely accepted as a constitutional document establishing and guiding the relationship between the Crown in Aotearoa New Zealand (embodied by the government) and Māori (D5.1). See also *te Tiriti o Waitangi*.

typeface: Family of fonts that share unique visual characteristics and design features (A6.2). See also *font*.

URL: Uniform resource locator; the web address to direct a user to a specific website (E2.4).

usability: Ease with which a publication, especially digital content, can be navigated and used by its audience (A1.4, A6.2, E1.3, E4.5). See also *accessibility*, *born-accessible publication*, *functionality*.

usage: Way speakers of a language habitually use words and phrases in speech and writing. The emphasis here is on what the speakers implicitly agree is the proper, not necessarily grammatical, use of that word or phrase (A2.5, D3.2, D4.1).

version control: System of file-management conventions that identifies different versions of a document or piece of content (A7.3, A8.6, B3.4).

voice: 1. Level and *style (def. 2)* of language appropriate to the nature of the material and its audience (D2, D2.2). **2.** Representation of characters, especially in fiction, through the *style (def. 2)* of language ascribed to them (A4.2, D2, D2.2).

widow: Typographical issue where the last line of a paragraph appears at the top of a page or column, and is therefore separated from the rest of the paragraph (E4.2). See also *orphan*.

word processing: Using a computer to create, edit, format, save and share documents (A7.1, A7.2).

Revision history

The first edition, then known as *Australian standards for editing practice*, was devised by the Standards Working Group of the Council of Australian Societies of Editors (CASE). It was approved by the members of all Australian societies of editors and ratified by CASE in 2001.

CASE was an informal national body succeeded by the Institute of Professional Editors Limited (IPEd), a not-for-profit company, in 2008. With the 7 societies of editors as its members, it was then the peak body for Australian editors. In 2016, the societies voted for IPEd to become a national direct-membership organisation with branches in each state, expanding to include the Aotearoa New Zealand branch in 2019.

Two working groups began work to update the *Standards* for a second edition. The first group was in 2005–06 and the second in 2010–11.

In late 2011, IPEd appointed a facilitator to consult with all Australian societies, through their committees and a series of workshops, similar to the process used for the first edition. Society-appointed coordinators worked with the facilitator to finalise the revision through national teleconferences and consultation with their workshop participants and society members. The resulting document was approved by members in 2012 and published in 2013.

For this third edition, IPEd sought submissions from members on changes to the *Standards*. It convened a new working party with representatives from Australia and Aotearoa New Zealand to review these submissions, meeting regularly throughout 2021 and 2022. During 2023, the draft third edition was reviewed by First Nations, Māori, accessibility, and diversity, equity and inclusion experts. It was then sent for final review by IPEd's Board and committees before feedback from IPEd members and ratification by the IPEd Board.

Acknowledgements*

The standards working groups, from inception to this third edition, acknowledge the assistance of Editors Canada (previously the Editors' Association of Canada), whose published standards have guided both the process and the output. In particular, the 2012 working group drew heavily on the preface and introduction to the 2009 edition of *Professional editorial standards*.

CASE Standards Working Group, 1998–2001

Kathie Stove DE ELS, convenor (South Australia)

Catherine Gray, secretary (New South Wales)

Catherine Bruce (Tasmania)

Amanda Curtin AE (Western Australia)

Janet Mackenzie DE (Victoria)

Rhana Pike ELS (New South Wales)

Loma Snooks DE (Canberra)

Janette Whelan DE and Mary-Jane Bosch (Queensland)

Standards Revision Working Group, 2005–2006

Shelley Kenigsberg, convenor (New South Wales)

Helen Bethune Moore (Victoria)

Robyn Colman (Tasmania)

Elizabeth Manning Murphy DE (Canberra)

Sharon Nevile (Queensland)

Helen Topor (Canberra)

Standards Revision Working Group, 2010–2011

Edwin Briggs AE, convenor (Canberra)

Hilary Cadman AE ELS (Canberra)

Elizabeth Manning Murphy DE (Canberra)

Kerie Newell (Canberra)

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* IPEd awards the postnominal AE (Accredited Editor) to editors who pass its accreditation exam. The postnominal DE (Distinguished Editor) applies to the editors who prepared and assessed the first 2 exams. ELS (Editor in the Life Sciences) and ELS(D) (Diplomate Editor in the Life Sciences) are awarded by the international Board of Editors in the Life Sciences (BELS). These postnominals have been applied to the acknowledgements, regardless of when they were awarded.

Standards Revision Working Group, 2011–2012

Kerry Davies AE, facilitator (Queensland)

Robin Bennett AE (Queensland)

Kerry Coyle AE (Western Australia)

Loene Doube AE (South Australia)

Rosemary Luke AE (chair, IPEd Council)

Cathy Nicoll AE (Canberra)

Rosemary Noble AE (Victoria)

Pam Peters DE and Denise Holden AE (New South Wales)

Elizabeth Spiegel AE (Tasmania)

IPEd Standards Working Party, 2021–2024

Sharon Lierse, chair

Joely Taylor AE ELS(D), deputy chair

Kerry Davies AE

Ruth Davies AE (chair, IPEd Board)

Justine Dixon Cooper

Julie Ganner AE

Linda Nix AE

Sue Pavasaris AE

Marja Stack AE

Paula Wagemaker

Consultants engaged for cultural review, 2022–2023

Accessibility reviewer: Michelle Teear, Accessible Arts

Diversity, Equity and Inclusion Review Panel: Renée Otmar DE (chair), Gaëtane Burkolter AE, Peter Loupelis, Wendy Neale

First Nations reviewers: Dr Mark J. Lock (Ngiyampaa/First Nations Australian) BSc (Hons), MPH, PhD; Angie Faye Martin (Kooma, Kamilaroi, European) BPH, MA

Māori reviewers: Anton Blank; Pania Tahau-Hodges (Ngāti Tūwharetoa, Tūhoe) MIndS, BA (Hons)