

# **PROFESSIONAL EDITORIAL STANDARDS (2009)**

Published by the  
Editors' Association of Canada/Association canadienne des réviseurs

## Preface to the 2009 Edition

What do editors do? That's a question most members of the Editors' Association of Canada (EAC) have been asked at one time or another, and it's the question addressed by this new edition of *Professional Editorial Standards*, revised and updated to reflect the skills and knowledge required by editors today.

*Professional Editorial Standards* is a pivotal document for EAC and for the editing profession. It sets out what editors should do when performing various stages of editing. It tells employers what to expect from the editors they hire. It shows new editors the range of skills and knowledge they should aspire to. It helps EAC, post-secondary institutions, and other training providers to design material, seminars, and courses on editing. And it's the foundation on which EAC's professional certification of editors is built.

Because *Professional Editorial Standards* aims to reflect what real editors do in the real world, it needs to be reviewed and updated periodically. The revision that led to this new edition was a major undertaking, spanning nearly three years and involving research, drafting, and review. EAC's Professional Standards Committee studied key EAC documents and other standards, consulted the EAC certification program, interviewed teachers and employers of editors, and surveyed members and non-members to gather their views. By spring 2009 the process was complete, and EAC members ratified the revised standards in May of that year.

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One might expect that inviting hundreds of editors to review and comment on a document as precise and self-defining as *Professional Editorial Standards* would produce an outpouring of detailed suggestions. It did. Fortunately, certain suggestions were echoed repeatedly, and these led to the main changes to the document.

The biggest changes affect how the standards are grouped. The former "Elementary Knowledge of the Publishing Process" section has been expanded, rewritten, renamed "The Fundamentals of Editing," and moved to the beginning of the document. The former "Structural and Stylistic Editing" section has been split into two sets of standards. Also new is the brief definition that precedes each stage of editing described.

This edition of *Professional Editorial Standards* has also attempted to clarify wording, update examples, reduce overlap between standards, and reflect current technologies. Throughout, it aims to be "genre-neutral"—that is, to describe editors' skills and knowledge regardless of the type of material they work on.

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Of the hundreds of editors who contributed to this revision, some deserve special mention. The members of the Professional Standards Committee organized and guided

the project from beginning to end: Nancy Flight, Laurel Hyatt (joined in late 2007), Jennifer Latham (stepped down in late 2007), Lynne Massey, Naomi Pauls, Frances Peck (committee chair), and Cy Strom.

The committee members were joined during the drafting phase by five senior editors, without whom this project could not have succeeded: Michelle Boulton, Kathy Garnsworthy, Perry Millar, Jan Walter, and Ruth Wilson.

Other EAC members whose advice and help were invaluable along the way were Lee d'Anjou, Lynda Chiotti, Barbara Czarnecki, Louis Majeau, Jonathan Paterson, and Jim Taylor. The many individuals from the certification program and the national executive council who were involved are too numerous to mention individually but too integral to this project to overlook.

The committee invited a group of senior editors from outside EAC to review a revised draft of the standards. Sincere thanks go to the generous and talented individuals who responded: Dennis Bockus, Lorie Boucher, Laura Boutin, Phyllis Bruce, Joy Gugeler, Nancy Huggett, Holly Keller, Lisa Manfield, Judy Phillips, Mary Schendlinger, Saeko Usukawa, and Jean Wilson.

Finally, the staff at the EAC national office did their usual indispensable job of making challenging volunteer work proceed as smoothly as possible. Thanks to each of them, especially Michelle Ou.

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These standards were developed by the Professional Standards Committee of the Editors' Association of Canada, were adopted by the membership on May 6, 2009, and took effect on January 1, 2010. They will continue to be reviewed regularly. Comments and suggestions should be addressed to

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# Professional Editorial Standards—Revised 2009

## Introduction

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

The editor is an intermediary who must skilfully and tactfully balance the interests of the employer or client, the author, and the audience. The editor is also part of a team that guides a work through its various stages from creation to publication, and must be familiar with, and respectful of, the contributions of others and collaborate effectively with all team members.

Capturing the full array of knowledge, skills, best practices, sequential tasks, and responsibilities required by all editors on all projects in all settings is impossible and is not what this document attempts to do. For one thing, editors work on many different subjects and many types of publications (fiction, websites, magazines, textbooks, and scientific material, to name a few) that require specialized knowledge and skills. For another, some editors perform tasks that extend beyond editing, such as project management, design, indexing, translation comparison, and website maintenance.

Regardless, there are certain *core standards* that professional editors should meet. The purpose of this document is to list the core standards—the knowledge, skills, and practices most commonly required for editing English-language material—and to provide examples that illustrate how those standards are applied in various types of publications.

The standards in this document cover the generally recognized editorial stages that begin when the material is more or less complete and end when it is ready for publication. The standards are divided into five parts:

- A. The Fundamentals of Editing
- B. Structural Editing
- C. Stylistic Editing
- D. Copy Editing
- E. Proofreading

Part A covers the knowledge and practices required of all professional editors, no matter which of the stages they work on. Parts B through E cover the skills required at each stage. In practice, not all editors work on all of these stages, and not all publications go through them all. Further, some overlap between stages is inevitable. The exact editorial process followed for a given publication will vary, depending on factors such as the quality of the original material, the intended audience and purpose, set practices within the company or organization, production methods and tools, schedule, and budget.

The editor who meets the standards given here is able to do a professional job with a minimum of supervision.

## **A. The Fundamentals of Editing**

Professional editors may perform a variety of tasks, from managing an entire publishing process to performing only a specific part of it. Regardless of the extent of their involvement, all editors need to have a broad understanding of the process and of their role within it. They should demonstrate initiative and flexibility, being able to adapt to the needs of the project and the specific work environment, and they need to communicate clearly and tactfully and to respect the opinions of others.

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

A professional editor meets the following standards.

### **KNOWLEDGE**

#### **A1 Know the publishing process**

Know that an editor is part of a larger process, whether for print or electronic publishing. Understand the stages of the process so that the editor's work complements the work of the other team members.

A1.1 Understand the stages of a project, the typical roles of a production team, and the editor's place in the process.

A1.2 Understand the generally recognized stages of the editorial process and be aware that they may overlap or unfold differently during a given project.

A1.3 Be familiar with the terminology commonly used in editing and publishing.

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

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

Be aware of the implications that the audience and purpose of the material have for editing and production choices. At every stage, look ahead to the final product.

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

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

#### **A4 Know the medium**

When editing any type of publication, know its parts and understand their purposes and their usual order or placement (e.g., parts of a printed or electronic page; parts of a book, periodical, or newsletter; conventions for government or corporate reports; conventions for websites or other electronic publications).

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

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

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

A5.2 Understand the ethical dimensions of the publishing process, including the need to address biased, non-inclusive, and offensive material.

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

A5.4 Know when permissions are required.

#### **A6 Know the basic elements of the design and production process**

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

A6.1 Understand how design can be used to convey meaning and improve readability.

A6.2 Understand how textual elements and the interrelationship between text, format, and design can affect readability in different media.

A6.3 Understand the conventions for displaying tables, figures, graphs, maps, and other visual elements.

A6.4 As the task requires, be familiar with typographical characteristics, including typographical measures (e.g., pixels, points), text alignment (e.g., indentation, justification), spacing (e.g., hair space, em space), and typeface (e.g., serif, sans serif, weight, x-height, ascender, descender).

A6.5 As the task requires, be familiar with software commonly used for design, formatting, electronic publishing, and web authoring.

A6.6 As the task requires, be familiar with common visual elements, such as the main graphic formats (e.g., EPS, JPEG, TIFF) and types of images (e.g., icons, photographs, video excerpts, illustrations).

## **PRACTICES**

### **A7 Set and maintain a realistic schedule**

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

### **A8 Define and apply the appropriate editorial intervention**

Bearing in mind the scope of the project (see A3), assess the quality of the material and determine the editorial intervention that is appropriate.

A8.1 Determine the extent of the edit to be applied: the stage or stages (structural, stylistic, or copy editing; proofreading) and the level of edit (heavy, light).  
Ensure that others on the team are aware of these decisions and what they entail.

A8.2 Having determined the extent of the edit, recognize what needs to be changed and perform the editing that is required or requested, applying the stage and level of edit consistently.

A8.3 Ensure that the format is appropriate for the material to best meet the needs of the intended audience, purpose, and medium.

A8.4 Consider the implications of time, cost, production processes, and the intended audience and purpose when suggesting changes. At the earliest opportunity, flag problems that may affect the schedule or budget.

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

Bearing in mind the legal and ethical dimensions of the publishing process (see A5), at the earliest possible opportunity, address any related issues that arise.

A9.1 Identify and either resolve or flag possible instances of legal problems (e.g., copyright infringement, plagiarism, libel, obscenity, privacy violations).

A9.2 Identify potentially biased, non-inclusive, and offensive material (e.g., racist, sexist, culturally stereotyped assumptions or content) and remove, amend, or flag it.

## **A10 Use common editing tools competently**

Use software, other electronic tools, and reference materials relevant to editing competently and efficiently.

A10.1 Use current electronic technology and software for working with and sharing materials with authors, clients, or team members.

A10.2 Maintain proficiency in the software features relevant to editing (e.g., finding and replacing items, marking revisions, checking spelling and language level).

A10.3 Know where to find and how to use current, reliable reference works, both print and electronic, including style guides, dictionaries, and other sources.

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

Communicate edits clearly. Manage files and documents methodically.

A11.1 Mark and convey changes, suggestions, and directions in a way that will be clear to the person who needs to apply them, whether orally or in writing (e.g., paper or electronic markup, margin notes, emails, assessments).

A11.2 Communicate clearly and tactfully with team members at all stages.

A11.3 Keep copies of successive drafts and proofs, identify who has made the changes, and take steps to ensure that all parties are using the current version of a document.

A11.4 Verify that requested changes have been made correctly and ensure that material approved in preceding stages has not been changed unintentionally.

## **A12 Introduce no new errors**

Make all changes without altering the intended meaning or introducing errors.

## **B. Standards for Structural Editing**

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

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

### **ASSESSMENT**

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

### **ORGANIZATION**

- B2 Reorganize material to achieve a coherent structure and sequence, a logical progression of ideas, and a narrative or expository flow and shape appropriate to the audience, medium, and purpose, keeping in mind that the medium often determines organization (e.g., the inverted pyramid structure of a newspaper story, the chapter arrangement of a book, the linked structure of a website). If necessary, create and follow a new outline or site map.

- B3 Determine and either indicate or implement the most effective positioning of all visual elements.

- B4 Revise, cut, or expand material, or suggest such changes, to meet length requirements.

### **CONTENT**

- B5 Identify and either recommend or make appropriate deletions (e.g., to remove repetitive or otherwise superfluous material) and additions (e.g., to fill gaps in content or strengthen transitions between sections) in both text and visual elements.

- B6 Recognize and either query or resolve instances of questionable accuracy, inadequate research, and imbalance in content.

- B7 Recognize and recast material that would be better presented in another form (e.g., number-laden text as a table, descriptive material as a diagram, a long series of points as a list, a lengthy digression as an appendix).

- B8 Select, create, or secure appropriate visual elements (e.g., images, sidebars, headings, video clips), if necessary, in keeping with the requirements and constraints of the publication (e.g., budget, schedule, format, medium). Determine the appropriate content and length of captions.

B9 Identify, create, or secure appropriate supplementary and referencing material (e.g., glossaries, endnotes, web menu items, hyperlinks).

B10 If required, create or secure accurate and complete peripheral material (e.g., masthead information in magazines, prelims and back matter in books, navigational and help content for electronic publications).

B11 Determine whether any permissions are necessary (e.g., for quotations, images, audio excerpts). If necessary, obtain these permissions or bring the matter to the attention of the appropriate person.

## **COMMUNICATION**

B12 Communicate clearly and diplomatically with the author or project supervisor to confirm structure, request clarification of content, and propose or negotiate broad editorial changes.

## **C. Standards for Stylistic Editing**

Stylistic editing is editing to clarify meaning, improve flow, and smooth language.

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

### **CLARITY**

- C1 Improve sentence construction to more effectively convey meaning (e.g., by using subordinate structures for subordinate ideas, choosing active voice over passive in most contexts, replacing negative constructions with affirmative ones, making unparallel constructions parallel).
- C2 Improve word choice to more effectively convey meaning (e.g., by replacing the general and abstract with the specific and concrete, replacing noun strings, eliminating clichés and euphemisms).
- C3 Where necessary, rewrite sentences, paragraphs, and passages to resolve ambiguities, ensure logical connections, and clarify the author's meaning or intention, in harmony with the style of the material.
- C4 In improving a sentence, paragraph, or passage or making it intelligible, change as little as possible and attempt to preserve the author's voice where appropriate.
- C5 Ensure that all tables, photos, multimedia, and other visual elements are clear and effectively convey the intended meaning.

### **FLOW**

- C6 Ensure that transitions between sentences and between paragraphs are smooth and support the coherent development of the text as a whole.
- C7 Where necessary, reorder sentences within a paragraph to ensure that the paragraph has a clear and coherent focus.
- C8 Adjust the length and structure of paragraphs to ensure variety or consistency, as appropriate to the audience and medium.
- C9 Adjust the length and structure of sentences to ensure variety or consistency, as appropriate to the audience and medium.

## **LANGUAGE**

C10 Determine the language and reading level appropriate for the intended audience and medium, and edit to establish or maintain that language and level (e.g., by translating jargon into understandable terms, using vocabulary that is suitable to the material, dividing long or complicated sentences into simpler ones).

C11 Establish or maintain a consistent tone, style, and authorial voice or level of formality appropriate for the intended audience and medium.

C12 Eliminate wordiness (e.g., by deleting redundancies, empty phrases, unnecessary modifiers).

## **COMMUNICATION**

C13 When working on paper copy, mark clearly and use standard editing marks unless another system has been agreed upon. When working on electronic copy, use an agreed-upon markup system (e.g., track changes, PDF markup tools).

C14 Use judgment about when to query the author or other appropriate person and when to resolve problems without consultation.

C15 Communicate clearly and diplomatically with the author or project supervisor to request clarification of meaning and intent, explain changes as appropriate, and propose or negotiate significant editorial changes.

## **D. Standards for Copy Editing**

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

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

### **CORRECTNESS**

- D1 Understand the rules of grammar in written English and correct errors (e.g., lack of subject-verb agreement, misplaced modifiers, incorrect pronoun case).
- D2 Understand the principles of punctuation and correct errors (e.g., comma splices, misplaced colons, incorrect apostrophes).
- D3 Correct errors in spelling (e.g., typographical errors, errors arising from homonyms and similar-sounding words).
- D4 Correct errors in usage (e.g., words commonly confused, such as *imply/infer*; incorrect idioms and phrases, such as *centres around*).

### **CONSISTENCY**

- D5 Identify and consistently apply categories of editorial style (e.g., abbreviations, measurements, treatment of numbers, Canadian/British/American spelling).
- D6 Develop a style sheet, or follow one that is provided, to track editorial style and apply it consistently.
- D7 Understand the different editorial styles for citing sources (e.g., APA, Chicago) and consistently apply a style appropriate to the material.
- D8 Identify and either correct or query inconsistencies in logic, factual details, and cross-references.
- D9 Ensure that all tables, photos, multimedia, and other visual elements are consistent with surrounding text and are consistently presented (e.g., headings, captions, numbering).
- D10 Understand the issues related to using other languages, especially French, in an English context (e.g., capitalization, italicization, accented characters) and edit for consistency.

### **ACCURACY AND COMPLETENESS**

- D11 Identify and either correct or query items that should be checked for accuracy (e.g., names of people and places, titles, quotations, web links).

D12 Identify and either correct or query errors in material containing statistics, mathematics, and numerals (e.g., incorrect imperial/metric conversions, incorrect totals in tables).

D13 Ensure that material is complete and, as appropriate, query or supply missing elements (e.g., captions and headings, web links, phone numbers, addresses).

D14 Recognize and flag places where citations are needed (e.g., quotations without a source, unsupported generalizations in academic work, tables that require a data source).

D15 Recognize elements that require copyright acknowledgement and permission to reproduce (e.g., quotations, multimedia, photos). If necessary, prepare acknowledgements and obtain permissions or bring the matter to the attention of the appropriate person.

## **COMMUNICATION**

D16 When working on paper copy, mark clearly and use standard copy editing marks unless another system has been agreed upon. When working on electronic copy, use an agreed-upon markup system (e.g., track changes, PDF markup tools).

D17 Use judgment about when to query the author or other appropriate person and when to resolve problems without consultation.

D18 Write clear, coherent, and diplomatic queries and notes for the appropriate person (e.g., author, client, other team members).

## **E. Standards for Proofreading**

Proofreading is examining material after layout to correct errors in textual and visual elements.

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

### **GENERAL PRACTICES**

- E1 Recognize the advantages and disadvantages of various proofreading strategies (e.g., reading with a partner, reading on screen or on paper) and apply the appropriate strategy for the material.
- E2 Adhere to the editorial style sheet for the material and update it, if necessary. If no style sheet is provided, prepare one and update it as proofreading progresses.
- E3 At first-proof stage, read the material word by word, comparing with previous copy if supplied.
- E4 After first proof and on all subsequent proofs, refrain from reading the entire text (unless instructed to do so) but check that all changes have been made as requested and that they do not introduce new problems (e.g., check line and page breaks, text flow, table of contents, navigation bar).
- E5 At all proof stages, refrain from undertaking structural, stylistic, or copy editing tasks unless authorized to do so.

### **ERROR CORRECTION**

- E6 Ensure that the first proof contains all the elements in the copy prepared for layout (e.g., all paragraphs, visual elements, headings).
- E7 Identify and correct typographical and formatting errors, paying special attention to problematic areas (e.g., spelling of proper names and non-English words; accuracy of numbers, tables, and figures).
- E8 Check consistency and accuracy of elements in the material (e.g., cross-references, running heads, captions, titles of web windows, hyperlinks, metadata).
- E9 Check end-of-line word divisions and mark bad breaks for correction.
- E10 Understand design specifications and ensure that they have been followed throughout (e.g., by checking alignment, type size and style, line length, space around major elements, rules, use of colour, appearance of hyperlinks).

E11 Recognize typographical and formatting irregularities (e.g., widows and orphans, overly ragged edges, ill-fitting text, incorrect text colour) and suggest adjustments to eliminate them.

## **JUDGMENT**

E12 Flag matters that may affect later stages of production (e.g., page cross-references; placement of art; alterations that will change layout, indexing, or web navigation).

E13 Query, or correct if authorized to do so, inconsistencies (e.g., in spelling, punctuation, fact, visual elements, navigation elements, metadata, other content that may not appear on a published web page). Use judgment about the degree to which such queries and corrections are called for.

E14 Incorporate alterations from authors and other individuals, using judgment and tact. Where comments conflict, use judgment to mark appropriate alterations.

E15 Choose from among various options the changes at each stage of proofreading that will prove the least costly or the most appropriate, given the production process, schedule, medium, desired quality, and type of publication (e.g., in an advertising flyer, pricing errors must be corrected no matter what the stage).

## **COMMUNICATION**

E16 When working on paper proofs, mark clearly and use standard proofreading marks unless another system has been agreed upon. When working on electronic proofs, use an agreed-upon markup system (e.g., PDF markup tools).

E17 Communicate more detailed instructions to the appropriate person (e.g., designer, project supervisor) as needed for the sake of clarity.

E18 Distinguish between and mark differentially printer's errors and author's or editor's alterations, if requested.

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