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Editing and
Proofreading

Inclusive

Professional

Working as a professional

Editorial knowledge and practice

Editorial excellence

Ethical

Supportive

Specialist knowledge and skills

Trustworthy

The CIEP Competency Framework

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The CIEP Competency Framework

Introduction

The CIEP Competency Framework describes the skills and knowledge that editorial professionals should seek to obtain and develop at various stages of their careers. We created it with CIEP members in mind but hope it will prove useful for all editorial professionals.

Designed in consultation with the CIEP's Learning and Professional Development Committee, the framework builds on the curriculum for professional development created by Jane Moody (the CIEP's then training director) in 2020. It aims to set the benchmark of what good practice looks like in the editorial profession, and to encourage practitioners to continually develop their skills and competency.

The Competency Framework will be reviewed regularly to make sure it still reflects current practice, highlights the skills and knowledge that will be needed as the world of work and the editorial profession evolve, and supports practitioners in their professional development. Please send any feedback and suggested changes to **pdm@ciep.uk**.

The 2025 edition of the Competency Framework includes versions of the two professional areas that are relevant to all editorial professionals – 'Working as a professional' and 'Editorial knowledge and practice'. We are still working on the third area, 'Specialist knowledge and skills', and will add this when it's ready. To download the version of the 'Specialist knowledge and skills' area from the 2020 curriculum for professional development, visit the CIEP website.

The professional areas

The framework is built around three main areas – 'Working as a professional', 'Editorial knowledge and practice' and 'Specialist knowledge and skills'. Each area is broken down into sections that cover the typical areas of practice of someone working as an editor or proofreader, and competences that describe the knowledge and skills required at each professional level. The three areas are:

Working as a professional
The first area describes the core knowledge and skills relevant to everyone working in the editorial profession. The sections in this area are:
- The roles and responsibilities of an editorial professional
- Professional practice and ethics
- Business management and practice
- Tools and technology

Editorial knowledge and practice
The second area describes the knowledge and skills that all practitioners should seek to develop. These are necessary to build a successful career in the editorial profession and to develop the core capabilities that a competent editor or proofreader needs. The sections in this area are:
- Publishing processes
- Editorial knowledge
- Editorial judgement
- Editorial practice

Specialist knowledge and skills (to be published in 2026)
The third area will describe knowledge and skills that are particularly relevant to specialist subjects and areas of practice. The sections currently within this area are:
- Fiction publishing
- Scientific and medical publishing
- Technical communications
- Legal publishing
- Music publishing

If you have any suggestions for additional sections, please send them to **pdm@ciep.uk**.

The levels

The framework is structured around four levels that represent progressively increasing competence in the editorial profession, from Exploring to Expert:

Exploring

You're starting to learn and develop the foundational knowledge and skills required of an editorial professional, and you're trying to find out whether it's the right career for you.

Emerging

You've started to deepen your understanding of editorial practices and processes and to refine your skills, and you're using these to work on editorial projects.

Experienced

You've mastered the fundamental skills that are relevant to an editorial professional in your area of practice, and you can apply your skills and knowledge to a wide range of projects in different contexts.

Expert

You've gained significant experience in the editorial profession, and you can use this experience to advise fellow professionals and to make insightful recommendations to colleagues and clients on editorial best practice.
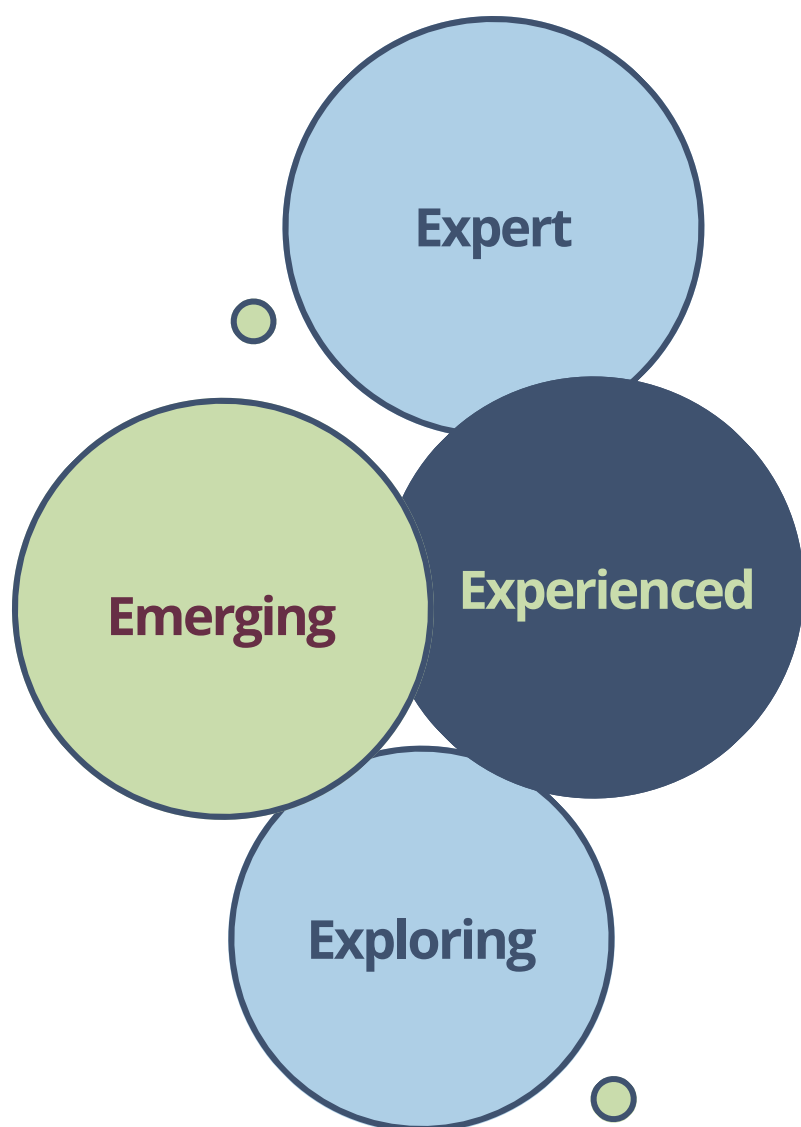
The content in each level aims to set out the knowledge and skills that will typically be required or expected of you at each stage of your career. This will, of course, depend on your professional context. The framework is not designed to be a checklist of knowledge and skills that all practitioners should be able to demonstrate in full. However, awareness of other processes and skills outside your day-to-day work, an in-depth knowledge of the profession in general, and a willingness to keep acquiring new skills are all valuable for your continuing professional development.

The Competency Framework is not directly linked to the CIEP membership upgrading process, and the competences are not intended to represent entry criteria for the membership levels. However, the framework can help you to identify gaps in your knowledge, which can then guide your CPD planning and ultimately support you if you apply to upgrade your membership.

You are not required or expected to master every skill or to gain every piece of knowledge described in the level that you think is most relevant to you. Depending on your individual context, you may feel that the knowledge and skills specified for other levels are more relevant to you.

On each row, there are four boxes describing the skills at each level. In some cases, two or more boxes have been merged to straddle multiple levels. This does not mean you should not continue practising a particular skill once you reach the higher level. It simply means that the skill can be fully mastered at the lower level.

Using the CIEP Competency Framework

You can use the framework to:

- assess your current knowledge and skills, and whether they're sufficient for your current career stage

- identify gaps in your knowledge and skills

- create plans to help you to develop, and to progress through the various stages, by engaging in CPD or by gaining experience through your professional practice.

At the start of each new section, you'll see a clickable icon on the right-hand side of the banner at the top of the page. By clicking on that icon, you'll be taken to a page on the CIEP website where you can find information about resources that will help you to develop the knowledge and skills described in that section of the framework.

As an editorial professional, you need to be aware of the importance of adjusting your skills and processes according to your individual context as well as the specific needs of a client or project. The framework has been developed with this principle in mind, and it's important to consider the context in which you're working when using it.

CIEP members should also bear in mind the conditions that apply to them as members: adhering to the CIEP's General Code of Conduct and Professional Practice Code, and complying with the relevant requirements when using the membership logo or referring to their CIEP membership.
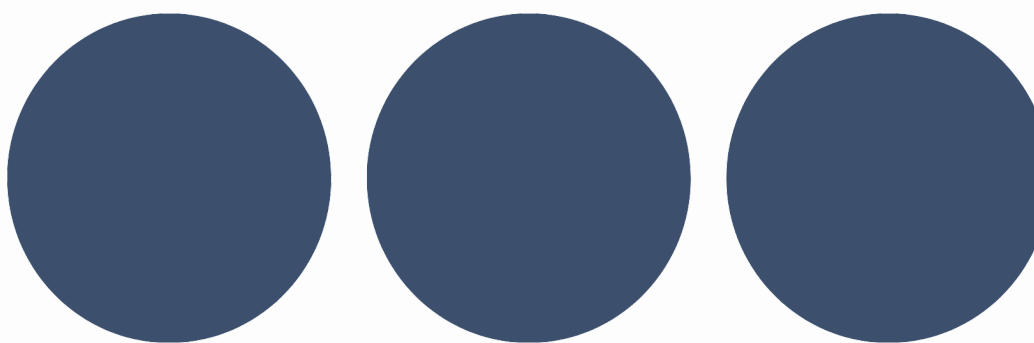
A note on terminology

Throughout the framework, the term 'publishing' refers to the process of an individual, group or organisation producing and sharing written material for certain audiences (both public and private), whether in print, in digital documents or online.

The lines between roles in the editorial profession are often blurred, but we have used the following definitions to set rough boundaries for each one (drawing on the CIEP's **glossary of editorial and publishing terms**):

- **Copyediting** – editing content to match the client's brief, the needs of the typesetter or designer and the expectations of the target audience. It is sometimes limited to correcting errors in spelling, punctuation and grammar, ensuring consistency, applying a house style, and using codes or formatting. Depending on the quality of the original text, it may include querying, rewording, rewriting, restructuring or research (particularly for non-fiction material).

- **Developmental editing** – 'big-picture' editing, aiming to help an author clarify their message effectively for the intended audience, or to develop and refine a story to achieve their creative goals.

- **Line editing** – sentence-level stylistic work that considers sense, voice, mood, viewpoint, pace and flow. It often involves suggesting revisions to the author and seeking clarification of unclear wording.

- **Project management** – overseeing an editorial project from inception to publication, managing scope, schedules, budgets and the people involved.

- **Proof-editing** – proofreading of unedited material that has already been typeset (usually as a PDF) or that will not be separately typeset (eg it has been prepared in a Microsoft Word document and will be published in that form). It usually needs a more in-depth approach than standard proofreading.

- **Proofreading** – reading and marking up the proofs of a text to fix any problems in layout and design, errors introduced during typesetting, or mistakes missed during copyediting.

The framework often uses the term 'good practice'. By this, we mean using methods and approaches that are effective, efficient and appropriate for a particular situation. Good practice is often developed over time and draws on advice from experienced professionals. Examples of good practice employed by editorial professionals include keeping up to date with new tools and techniques, and ensuring good communication with clients or colleagues.

We use the following terms to describe varying levels of competence:

- **Is aware of** – appreciates the importance and relevance of the knowledge or skill described, and is working to learn more in order to start using it in a professional context

- **Understands** – has some professional experience and understanding of the knowledge or skill

- **Applies** – uses the knowledge or skill consistently and confidently

- **Recommends** – is able to use the knowledge or skill to make recommendations on editorial practice to non-practitioners, such as recommending how to use conscious language or how to present data

- **Can advise** – is able to use the knowledge or skill to advise or support fellow editorial practitioners on good practice in an editorial context, such as on the CIEP forums, by answering questions and suggesting solutions.

Working as a professional
The roles and responsibilities of an editorial professional

As an editorial professional you should seek to develop your knowledge and understanding of the role and purpose of the profession as a whole, as well as your role as an individual and how you contribute to publishing processes, regardless of context. This includes:

- understanding the role and purpose of the profession and using this understanding to inform others of the value of high editorial standards
- having a good understanding of the place and value of editors and proofreaders within publishing teams and processes, and their respective roles and responsibilities.

	Exploring	Emerging	Experienced	Expert
The role and purpose of the editorial profession	Is aware of the role and purpose of the editorial profession – helping to make text accurate, clear and fit for its intended audience so that it achieves its objective	Uses their understanding of the role and purpose of the editorial profession to clearly explain its value to others Understands the importance of high editorial standards	Advocates to others for the value and importance of the editorial profession Understands the impact that high editorial standards have on publishing processes in a variety of contexts	Actively champions the value of the editorial profession in public spaces Advocates for high editorial standards
	Is aware of the limitations of automated or generative tools and the value of human intervention in editorial work	Uses their understanding of the limitations of automated or generative tools to explain the value of human intervention in editorial work to others	Advocates for the use of human intervention in editorial work	

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|	Exploring	Emerging	Experienced	Expert
The various roles of editorial professionals	Is aware that there are different roles within the editorial profession (eg copyeditor, proofreader, editorial project manager) and that the scope of those roles differs	Understands the different types and levels of editorial services and can define any services they offer Understands the need to stay within the scope of their role and not make unnecessary changes, given the required level of intervention for a project Is aware of the different possible stages of editorial work (eg developmental editing, copyediting, proofreading) and different levels of intervention at each stage depending on the needs of the project	Can define the types and levels of editorial services, including those they don't offer	Can advise on the types and levels of editorial services available and can identify which are most appropriate for specific projects Signposts to providers of those services they don't offer

	Exploring	Emerging	Experienced	Expert
Roles and responsibilities of editors and proofreaders within a publishing team	Understands their own role and responsibilities within a project and can define these to others	Understands their responsibilities towards others within the publishing process	Has a solid understanding of the editorial profession and publishing processes	Uses thorough understanding of the editorial profession and publishing processes to advise colleagues and/or clients on good practice
	Is aware of the wider publishing context and the roles that other people in the team or process play (eg project manager, designer) Understands the roles and responsibilities within an editorial team (eg project manager, typesetter)	Understands, and can define, the roles professionals play within the publishing process	Understands where to seek advice regarding publishing processes in order to advise colleagues and clients Deepens their understanding of other roles and responsibilities within an editorial team (eg project management) so they can take on aspects of those roles when necessary	Has the depth of understanding to be able to take on aspects of other roles within an editorial team when necessary Is aware of external influences which may impact upon publishing processes

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	Exploring	Emerging	Experienced	Expert
Roles and responsibilities of editors and proofreaders within a publishing team	Understands the structure of the team, reporting lines, and where to go for support or questions			
	Is aware of their individual contribution to publishing processes	Understands the value and importance of their individual contribution to publishing processes and can define this to others	Advocates for the value of their role in publishing processes	Advocates for the importance and value of the wider editorial profession in public spaces
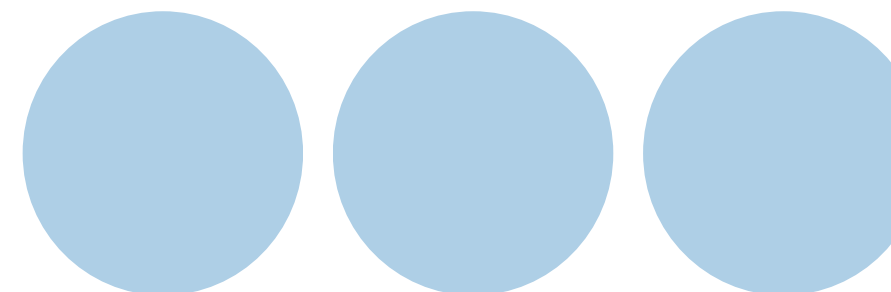
Working as a Professional
Professional practice and ethics
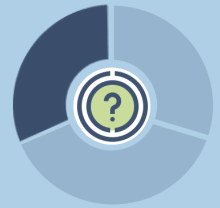
Upholding ethical standards and supporting clients and colleagues to comply with legal requirements is a key responsibility of editorial professionals. For you, as a member of the editorial profession, this means:
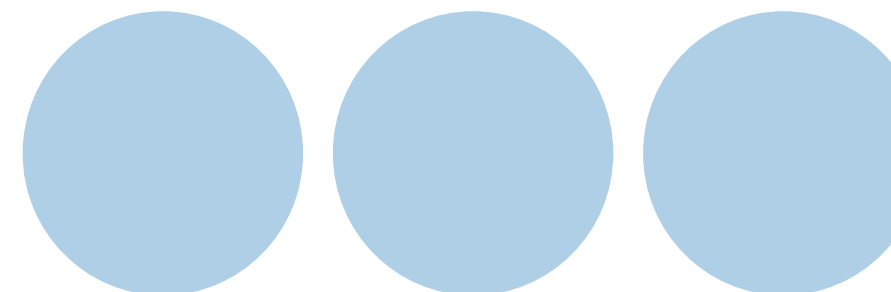
- having at least a basic understanding of legal frameworks in publishing, and developing this knowledge throughout your career
- knowing how to demonstrate ethical practice and how to communicate professionally and negotiate successfully
- understanding the importance of, and demonstrating a commitment to, continuing professional development, being able to identify gaps in your skills and knowledge, and developing plans to fill these gaps.

	Exploring	Emerging	Experienced	Expert
Basic legal framework in publishing	Is aware of the main legal aspects of publishing (eg copyright ownership, plagiarism, data protection issues and libel)	Understands legal aspects of publishing, including public domain, licensing, moral rights, privacy, obscenity, acknowledgements, permissions and non-disclosure agreements	Understands, and can explain, legal aspects of publishing in order to support colleagues and/or clients	Stays up to date with legal aspects of publishing which may impact their professional work Signposts fellow editorial professionals to appropriate sources of information

	Exploring	Emerging	Experienced	Expert
Basic legal framework in publishing	Is aware of the purpose of legally binding agreements (eg contracts, terms and conditions) and their implications in an editorial context, and the need to seek professional advice regarding such agreements	Understands the purpose of legally binding agreements in an editorial context and is aware of potential issues to consider and who to consult if issues are identified, and knows where to seek professional advice regarding them	Understands what information is legally required to appear in various types of legally binding agreements in an editorial context	Signposts to resources for helping understand various types of legally binding agreements in an editorial context
	Is aware that legal issues may arise in editorial contexts and knows who to approach or notify of concerns	Understands how to raise potential legal issues with colleagues or clients	Suggests resolutions to legal issues in an editorial context	Can advise on the kinds of legal issues to look out for in texts
	Is aware of the need to make a basic agreement with a client	Understands how to draft a basic agreement (eg via email) and where to find information and appropriate templates	Is confident in drafting agreements (eg email contract, signed contract) or adapting an appropriate template	Can advise on the information which is typically included in an agreement or where to find information and appropriate templates

	Exploring	Emerging	Experienced	Expert
Professional ethics	Is aware of gaps in their knowledge and experience and how this can affect their work Understands the need to turn down work for which they are not qualified	Identifies aspects of a brief that require them to seek advice or support before taking on a project Recommends where to find an appropriately qualified professional (eg through the CIEP directory) when turning down work for which they are not qualified	Is confident in their ability to work on projects for which they are qualified Can explain why they are not qualified to take on a particular project and can make recommendations of the skills required for that project	Advocates for the importance of finding an appropriately qualified professional to take on editorial work
	Is aware of potential ethical issues that may arise in an editorial context (eg confidentiality, objectivity, conflicts of interest, working with students on assessed materials)	Understands how to raise concerns about potential ethical issues	Navigates potential ethical issues with clients or colleagues in a professional manner	Can advise on appropriate methods of dealing with potential ethical issues
	Is aware of the need to address offensive, biased or non-inclusive material	Identifies and queries offensive, biased or non-inclusive material	Addresses offensive, biased or non-inclusive material	Makes recommendations on how to address offensive, biased or non-inclusive material

	Exploring	Emerging	Experienced	Expert
Professional ethics	Is aware of the need to tailor material to make it appropriate for different publishing markets around the world	Suggests how to tailor material to make it appropriate for different publishing markets around the world	Tailors material to make it appropriate for different publishing markets around the world	Can advise on how to tailor material to make it appropriate for different publishing markets around the world
	Is aware of the need to make print, online, audio, video and digital materials accessible for all users, including people with disabilities	Understands the importance of accessibility for both users and publishers and can explain its significance and relevance to clients and colleagues	Stays up to date with good practice for accessibility, such as Web Content Accessibility Guidelines (WCAG) and regulations (eg European Accessibility Act)	Can advise on where to find and how to navigate information to stay up to date with accessibility guidelines

	Exploring	Emerging	Experienced	Expert
Professional relationships and communication (*See also* 'How to query' in Editorial judgement)	Communicates clearly, professionally and politely (including using standard spelling, grammar and punctuation) with clients and colleagues	Communicates diplomatically with clients and colleagues, even in difficult situations Knows where to find advice on how to navigate delicate or difficult situations	Uses appropriate channels of communication (eg email, telephone, video call, social media) for different circumstances Navigates delicate or difficult situations in professional settings	Can advise on communicating professionally and diplomatically, and how to navigate delicate or difficult situations in professional settings
	Is aware of the need to make communications accessible	Understands how to adapt professional communications for different communication needs and preferences, and how to make communications accessible	Adapts professional communications for different communication needs and preferences	Maintains awareness of changes in good practice in relation to communications
	Understands the value of building professional relationships with fellow editorial professionals via relevant networks	Uses relevant channels, such as CIEP forums and groups, to build professional networks	Proactively seeks out appropriate networking opportunities that meet their needs and preferences	Facilitates opportunities to build relationships with fellow editorial professionals

	Exploring	Emerging	Experienced	Expert
Continuing professional development (CPD)	Understands the need for continuous learning throughout their career	Determines appropriate continuous learning for their own career	Adapts to major changes in the editorial profession and the wider context (eg use of AI) by seeking out appropriate learning and training opportunities	Maintains awareness of changes in the editorial profession and wider context to pre-empt gaps in personal knowledge and skills Can advise on and suggest appropriate CPD opportunities for others
	Identifies personal strengths and weaknesses in knowledge and skills	Creates professional development plans to fill gaps in knowledge and skills	Regularly reviews and updates professional development plans	Continues to seek out relevant training and learning opportunities related to personal area(s) of expertise, including business, marketing, subject specialisms etc Identifies specific knowledge and skills on which they can provide training or support to others

	Exploring	Emerging	Experienced	Expert
Continuing professional development (CPD)	Identifies sources of CPD Takes up CPD opportunities which are relevant to them	Proactively seeks out and engages with CPD opportunities which contribute towards professional development objectives	Regularly reviews appropriate CPD opportunities and acts on those reviews by undertaking regular CPD	Identifies opportunities to offer CPD as part of their own CPD planning – through teaching, mentoring, speaking opportunities etc – and encourages and supports others to undertake regular CPD Advocates for the need to undertake regular CPD and models good practice
	Records CPD and improvement of skills and knowledge	Demonstrates (through clear records) regular CPD and improvement of skills and knowledge	Continues to demonstrate (through clear records) regular CPD and improvement of skills and knowledge	

Working as a Professional
Business management and practice

As an editorial professional you should develop your skills, knowledge and understanding of the successful running of a business, whether managing your own freelance business or working in-house for an established organisation. That means:

- working to continually develop your knowledge and understanding of standard business practices, your ability to keep effective records and manage files efficiently, and your ability to work to agreed schedules with clients and colleagues.

Depending on your individual context, it may also mean:

- developing a deep understanding of legal requirements for running a business, and improving skills in marketing the services you provide.
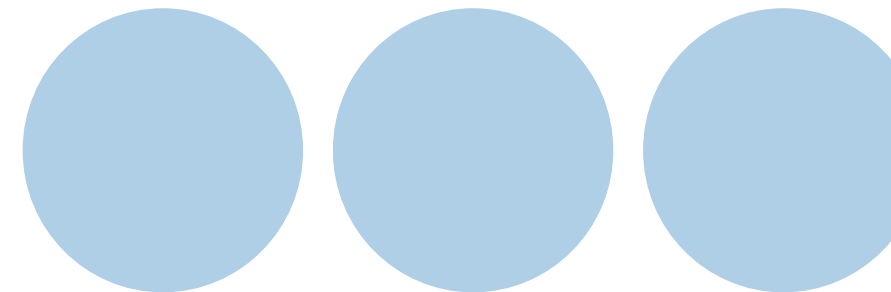
	Exploring	Emerging	Experienced	Expert
Content which is primarily relevant to those running/thinking about running a freelance business				
Legal requirements for running a freelance business	Keeps records of income, allowable expenses and tax liabilities in accordance with relevant jurisdiction	Has developed a method for maintaining organised records of income, allowable expenses and tax liabilities in accordance with relevant jurisdiction	Can advise on methods for recording and tracking income, allowable expenses and tax liabilities	
	Keeps necessary financial records for the required length of time	Maintains organised and detailed financial records for the required length of time	Analyses financial records to identify trends in income and expenses	Can advise on keeping and analysing financial records

	Exploring	Emerging	Experienced	Expert
Legal requirements for running a freelance business	Understands and adheres to the requirements of the relevant jurisdiction regarding registering for tax purposes (eg HMRC or Companies House in the UK)	Understands and adheres to the tax requirements for a business structure (eg sole trader, private limited company) and has registered appropriately		Signposts to resources and information on how to register a business with a domestic tax system
	Understands and complies with data protection practices and requirements in accordance with the relevant jurisdiction of both the business and the client	Follows good data protection practices and requirements in accordance with the relevant jurisdiction of both the business and the client		Signposts to resources and information on data protection practices and requirements in accordance with relevant jurisdictions
Business policies	Is aware of the potential need for and benefits of relevant business insurance policies	Understands the need for and benefits of relevant business insurance policies	Identifies and reviews business insurance policies that are suited to their needs	Can explain the potential need for and benefits of business insurance
	Understands the need for terms and conditions and policies (eg privacy policy, confidentiality agreements, terms of use)	Creates or amends relevant terms and conditions and policies	Stays up to date with new or updated legislation around terms and conditions and policies	Signposts to information and templates for terms and conditions and policies

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	Exploring	Emerging	Experienced	Expert
Financial matters	Is aware of the need to set rates for charging clients, taking expected expenses, overheads and target profits into account	Understands how to set appropriate rates for different projects and circumstances	Reviews and revises rates as appropriate	Analyses data to determine appropriate rates to charge
	Is aware of the need to issue invoices at the appropriate point, and the typical payment methods and timescales for payment	Knows where to get advice about how to handle issues regarding late payments and non-payments	Handles issues regarding late payments and non-payments	Can offer suggestions on how to handle issues regarding late payments and non-payments
	Knows all the necessary details to include on an invoice, including relevant legal requirements in accordance with the jurisdiction	Prepares detailed invoices, and has a suitable system for tracking them	Navigates automated invoice submission systems as appropriate	Can advise on how to prepare and track invoices
Record keeping and documentation	Understands the importance of good record keeping (eg matters agreed, insurance policies, website hosting details, passwords, client contact details and documents handled)	Uses record-keeping system and follows good practice	Understands the importance of sharing their business record-keeping system with a business succession executor	Advocates for the importance of setting up business succession plans

	Exploring	Emerging	Experienced	Expert
Content which is relevant to all practitioners, regardless of context				
Time management and working to a schedule	Is aware of constraints imposed by schedules and that not meeting agreed deadlines will impact other elements of the publishing process Works to agreed deadlines	Raises queries about the priority of different aspects of a project, to identify the most important/urgent Understands the need to balance speed and quality	Follows good practice to work within schedules by balancing speed and quality Adapts to cope with and negotiate changes in scheduling	Makes suggestions about aspects to prioritise in a project to give the best outcome within the time constraints
	Is aware of the need to keep others updated on the progress of work	Keeps others updated on the progress of work, and raises issues that might cause scheduling problems Tracks time spent on a project as required	Anticipates and raises issues in current project that might cause scheduling problems Can provide a breakdown analysis of time spent on tasks for a particular project	Recommends ways to navigate issues that might cause scheduling problems
	Explores the use and benefits of time management tools (eg spreadsheets, time-tracking software)	Understands and uses time management tools	Keeps up to date with the development of time management tools	

	Exploring	Emerging	Experienced	Expert
Time management and working to a schedule	Is aware of the need to keep sensible working hours and workload to preserve quality and standards of work	Maintains sensible working hours and workload to preserve quality and standards of work	Identifies solutions to maintain sensible working hours and workload to preserve quality and standards of work	Advocates for good practice in maintaining sensible working hours and workload
	Is aware that there may be a need to balance multiple project schedules	Understands how to balance multiple project schedules	Balances multiple project schedules while keeping to agreed deadlines	Can advise on balancing multiple project schedules

	Exploring	Emerging	Experienced	Expert
Pricing, quoting and budgeting	Keeps records of projects and rates of work (eg number of words edited per hour) for the purposes of future quoting and budgeting	Understands how to estimate the effort required for a project and uses records to quote and budget for future projects, based on past rate of work	Provides accurate, detailed estimates or quotes for projects based on previous experience and records	Uses records of breakdown of tasks to hone accuracy of quotations for projects
	Is aware that the scope of their work is informed by a project budget	Understands how budgeting limitations may affect scope of work	Understands how publishing schedules and budgets interact Adapts to cope with changes in budgeting	Balances budgeting limitations Can advise on how project budgets affect scope of work
	Is aware that fees, scope and deadlines can be open to negotiation, and recognises when it is appropriate to negotiate these	Understands how to negotiate appropriately on fees, scope and deadlines	Applies good practice in negotiating appropriately on fees, scope and deadlines (eg being confident but polite, communicating clearly)	Recommends solutions when negotiating with a colleague or client
	Is aware of constraints on their own work – and working hours – imposed by budgets	Understands the need to balance cost and quality, and raises queries about the priority of different aspects of a project, within budgetary constraints	Applies good practice in balancing cost and quality by adjusting the level of work to meet the parameters of the project	Makes recommendations about what to prioritise in a project

	Exploring	Emerging	Experienced	Expert
Marketing of services	Is aware of different avenues for marketing services: digital marketing, content marketing (such as blogging), networking, advertising, business website, professional directories and offline marketing materials	Uses different avenues for marketing their services as needed	Identifies avenues for marketing of services that would be appropriate for their business	Can advise others on the value and principles of different avenues for marketing of editorial services
	Is aware of the role of branding and identity for building a business	Understands the role of branding and identity for building a business	Consistently applies branding and identity to promotional materials and content	Makes informed decisions about rebranding as appropriate
	Is aware of the potential benefit and value of professional directories, such as the CIEP Directory of Editorial Services, the EFA Member Directory, the AFEPI Directory and the ACES Editors for Hire Directory	Lists themself in professional directories	Maintains entries in professional directories and considers their value	Advocates for the benefits of professional directories for marketing of services
	Is aware of the value of a business website for marketing services	Understands some options for developing and hosting a business website	Sustains a business website, and updates it when appropriate	Can advise others on the use and content of a business website appropriate to an editorial professional

	Exploring	Emerging	Experienced	Expert
Marketing of services	Understands and complies with laws regarding spamming and unsolicited communications (eg UK and EU GDPRs)	Follows good practice regarding data protection and unsolicited communications in contacting potential clients	Has a system in place to avoid accidental spamming	
Professional use of social media and public digital spaces	Behaves professionally in all social media and public digital spaces			
	Follows good practice in use of social media and other digital spaces (eg forums, blogs, online conferences/webinars), and is aware of the impact that posts in these spaces can have on their professional reputation	Follows good practice regarding accessibility standards in social media and other digital spaces	Maintains an awareness of developments in accessibility standards in social media and other digital spaces	

Working as a Professional
Tools and technology

There is a myriad of tools, systems and technology to help editorial professionals to improve their editorial efficiency. To make good use of them, that means:

- ensuring you are confident in using the tools and technology most relevant to you, while aiming to keep abreast of updates and developments in technology used in the industry
- ensuring that you develop file management and security skills and knowledge, and apply good practice to avoid loss, corruption and confusion.

	Exploring	Emerging	Experienced	Expert
Operating systems and computing devices	Is able to use relevant operating systems (eg Windows, MacOS, iOS) securely (eg password protection, using secure WiFi, logging off), as required for editorial work Regularly runs adequate anti-virus software and updates software frequently			
	Is aware that differences between the most popular operating systems (eg Windows, MacOS) may affect the software used in editorial work	Understands the main differences between the most popular operating systems and how they affect the software used in editorial work	Knows how to locate advice on troubleshooting problems caused by compatibility issues between different operating systems	
	Is aware of the need to use suitable devices for editorial work, including updating or replacing them to ensure that the security and capability of those devices do not negatively affect editorial work		Knows when to update or replace devices to ensure that the security and capability of those devices do not negatively affect editorial work	Can advise on suitable devices for editorial work

	Exploring	Emerging	Experienced	Expert
Software	Uses MS Office programs – Word (especially Track Changes, Styles and Templates), Excel and PowerPoint (where appropriate) – and is aware of techniques and add-ons to increase efficiency	Uses good practice when working with MS Office programs and uses some techniques and add-ons to increase efficiency (eg advanced Find and Replace, PerfectIt, macros)	Is proficient in using techniques and add-ons to increase efficiency	Can adapt techniques in using software to match their own circumstances Keeps up to date with developments in MS Office programs, and adapts working practices accordingly
	Is aware that clients may require editing to be carried out in a range of different programs (eg Google Docs, InDesign)	Uses other word-processing software (eg Google Docs) or desktop publishing software (eg InDesign) in addition to MS Word, as necessary	Uses good practice when using word-processing software (eg Suggesting in Google Docs) or desktop publishing software in addition to MS Word Converts files between different word-processing software	Troubleshoots common problems in conversion between different kinds of software
	Uses Adobe Acrobat Reader (or equivalent) and is aware of tools (eg PDF commenting, traditional proofreading markup)	Is proficient in using Adobe Acrobat Reader (or equivalent) and tools	Is confident in using Adobe Acrobat Reader (or equivalent) and tools	Keeps up to date with developments in Adobe Acrobat Reader (or equivalent), and adapts working practices accordingly
	Can use proprietary editing or proofreading software (eg Project Gutenberg's Distributed Proofreaders) or content management system (eg WordPress) as required			

	Exploring	Emerging	Experienced	Expert
Software	Is aware of potential uses, limitations and impact of AI and automation in publishing and the potential ethical and legal implications	Understands the uses and limitations of AI in publishing, especially in writing and editing, and addresses issues arising from its use Considers the ethical and legal implications of the use of AI and AI-generated material in publishing	Understands good practice in the use or avoidance of AI tools in publishing	Can advise on the uses, limitations, and ethical and legal implications of using AI in publishing, especially in writing and editing
	Is aware of the need to keep up with developments and trends in the use of technology in relation to editing and proofreading (eg software, AI)	Follows discussions on developments and trends in the use of technology in relation to editing and proofreading	Investigates the capabilities and potential benefits or limitations of developments in technology in relation to editing and proofreading	Can advise on the capabilities and potential benefits or limitations of developments in technology in relation to editing and proofreading Assesses the wider impact of such developments and trends on editorial practices
	Is aware of collaboration and communication software (eg Zoom, MS Teams, Slack)	Uses collaboration and communication software when required	Demonstrates good practice when using collaboration and communication software, such as accessibility features	Identifies most suitable form of collaboration and communication software for different projects

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	Exploring	Emerging	Experienced	Expert
File management	Can open and save documents in a variety of file formats (eg .docx, .pdf, .epub, .dotx)	Seeks help to resolve basic file issues, such as potential file-conversion and cross-platform problems	Resolves basic file issues, such as file-conversion and cross-platform problems, or knows where to seek help or when to return the responsibility to the file owner	Can advise on basic file issues, such as resolving file-conversion and cross-platform problems Recommends potential solutions to file issues to the file owner
	Is aware of the need for sensible naming, storing and organisation of files to support version control	Maintains a system for naming, storing and organisation of files to support version control, and follows good practice in its use	Can advise on good practice in naming, storing and organisation of files to support version control	
	Is aware of the importance of backing up files and having a backup/archive strategy, and regularly saves backups of files	Understands how to save backups of files in multiple locations, uses a backup/archive strategy, and uses an alternative method for backing up files if client does not permit external or cloud storage	Demonstrates good practice in saving backups of files in multiple locations, including external hard drive and cloud storage, and demonstrates good practice in their backup/archive strategy	Keeps up with developments in good practice for backing up files and on developing a backup/archive strategy
	Is aware of collaborative editing programs (eg Google Docs, Word for web)	Where appropriate, uses a range of collaborative editing programs to effectively work in a team on the same file	Troubleshoots file conversion and version control issues when using collaborative editing programs	Keeps up with developments in collaborative editing programs

	Exploring	Emerging	Experienced	Expert
File security	Is aware of the need for, and can use, secure methods for file sharing and transfer (eg password-protected files, WeTransfer, cloud storage systems such as Dropbox or Google Drive)	Determines which methods for secure file sharing and transfer might be most appropriate to the project or client	Maintains knowledge of new and developing secure methods for file sharing and transfer, independently and in/through professional fora	Can advise on the use of appropriate methods for file sharing and transfer
	Is aware that clients may set conditions on a retention period and on deletion of files and any confidential source material after completion and delivery of a project	Where appropriate, agrees on retention period and on deletion of files and any confidential source material after completion and delivery of a project	Applies good practice in retention and deletion of files (eg following relevant data laws or client restrictions)	
	Purges files when disposing of an old computer or storage media (eg external hard disk, flash drive)			

Editorial knowledge and practice
Publishing processes

As an editorial professional, you need an understanding of the processes, models and terminology involved in publishing. That means:

- understanding the stages of publishing processes relevant to you and your specialisms, and the role that you play in them
- understanding – and being able to identify – different types of content and the different models that may be more or less appropriate for such content
- understanding the importance of the principles of accessibility within publishing – covering both print and online materials – and continuing throughout your career to develop your ability to adapt materials to improve their accessibility.

	Exploring	Emerging	Experienced	Expert
Different models of publishing	Is aware of different publishing models (eg traditional publishing, businesses and other non-publisher clients, self-publishing)	Understands the processes involved in working in different publishing models	Understands the different financial models of publishing (eg traditional publisher pays, author pays, open access, hybrid models, self-publishing)	Explains the differences between publishing models and recommends appropriate models to clients
Types of content	Is aware that different types of content (eg academic texts, marketing materials, children's books) require different editorial treatment	Recognises the appropriate editorial treatment required for different types of content	Consistently applies the appropriate editorial treatment, according to the type of content	Can advise on the appropriate editorial treatment of different types of content
Parts of a publication	Is aware of the conventional parts (eg title page, copyright page, table of contents, list of illustrations, list of abbreviations) of different types of publications (eg book, journal, report)	Understands and checks the conventional parts of different types of publications, and their usual order or placement	Understands and ensures adherence to the requirements for the conventional parts of different types of publications and their purposes	Generates missing parts of different types of publications if needed

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	Exploring	Emerging	Experienced	Expert
Publishing workflows	Is aware of the various stages that may be involved in publishing content and the terminology commonly used to describe these processes	Understands the various stages that may be involved in publishing content and uses common terminology to describe these processes	Recognises how the stages involved in publishing content may affect the editorial work Can explain common publishing terminology	Can explain the stages involved in publishing content to clients, and which are most relevant to them
Editorial processes	Clarifies the type of work required by a client or colleague in a project (eg copyediting, proofreading)	Understands the type of work required by a client or colleague in a project and can query this when necessary	Recommends the stages of the editorial process needed for a particular project	Evaluates a project's readiness for a particular stage in the editorial process
	Understands and uses common editorial terminology (words and phrases that are used regularly within the editorial workflow, eg queries, typesetting, revises)	Understands and uses a wide range of editorial terminology	Has in-depth knowledge of editorial terminology in one or more fields	Can explain a wide range of editorial terminology
Publishing schedules and budgeting	Understands the importance of scheduling and budgeting within the publishing process	Understands the influence of schedule and budget on the scope of editing and proofreading	Adapts to, and negotiates, changes in scheduling or budgeting Proposes schedules and budgets to clients or colleagues	Mitigates issues arising from changes in scheduling or budgeting

	Exploring	**Emerging**	**Experienced**	**Expert**
Design typography, typesetting and printing	Is aware of the uses of different fonts and typefaces	Understands the meaning and use of common typographical terminology	Uses special characters as appropriate, and mitigates issues arising from their use in different programs Uses different typefaces instead of formatting (eg using a font's italic version instead of direct formatting as italic)	Applies detailed knowledge of different fonts, typefaces and their uses, and ways of mitigating issues arising from the use of special characters Can explain issues arising from using direct formatting rather than the correct version of a font, and can offer potential solutions
	Is aware of elements of layout and presentation at a *structural level* (eg line and paragraph spacing, justification, heading style)	Applies a good understanding of elements of layout and presentation at a *structural level*	Collaborates with a typesetter to ensure that layout and presentation of content meet requirements at a *structural level*	Can advise on collaborating with a typesetter to ensure that layout and presentation of content meet requirements at a *structural level*
	Is aware of how word and character spacing, indentation and word breaks over line ends affect presentation of content at a *line level*	Identifies issues that affect presentation of content at a *line level*, and raises appropriate queries	Collaborates with a typesetter to ensure that layout and presentation of content meet requirements at a *line level*	Can advise on collaborating with a typesetter to ensure that layout and presentation of content meet requirements at a *line level*
		Is aware of different binding methods (eg saddle-stitched, perfect binding, sewn, case binding, self-cover)	Is aware that different binding methods may have an impact on positioning of material on the page	

	Exploring	Emerging	Experienced	Expert
Digital publications and online content		Understands the impact that different digital platforms have on presentation, especially when screen size and software vary	Points out issues with presentation and advises on solutions	
Accessibility	Is aware of their role in making print, online, audio, video and digital materials accessible for all users (eg querying legibility of font, suggesting alt text)	Keeps up to date with developments in making print, online, audio, video and digital materials accessible for all users Identifies potential accessibility issues, and raises appropriate queries	Adapts material to increase accessibility Makes recommendations to others on how to increase accessibility of materials	Can advise on how to adapt material to increase accessibility
Record keeping	Keeps track of communications with clients or colleagues relating to a project (eg queries and replies to them, decisions taken)	Keeps appropriate records (eg changes made, decisions taken, queries, replies to queries, whether queries are resolved or unresolved) when working within a publishing process	Understands that different types of publishing process require different records to be kept, and follows good practice in keeping records	Can advise on records that should be kept when working within a publishing process

Editorial knowledge and practice
Editorial knowledge

The skills and knowledge in this section are some of the most important for any editorial professional. That means, for all levels:
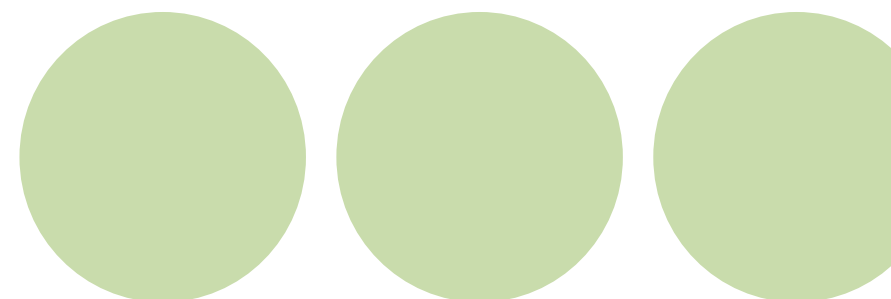
- continuing to develop your understanding of spelling, punctuation and grammar, and how to use them appropriately for different audiences, channels and variants of English
- being able to identify, understand and apply appropriate usage and conventions for numerical figures and data, non-textual elements, references and other sources of information.

	Exploring	Emerging	Experienced	Expert
Grammar and the use of English	Understands common grammatical terms (eg noun, verb, tense)	Understands more complex grammatical terms (eg predicate, gerund, dangling modifier)	Understands a wide range of grammatical terms and uses this knowledge to explain changes and queries	Can explain grammatical terms in plain language
	Understands and applies relevant conventions of English grammar	Applies the principle that English grammar conventions largely depend on context, rather than definite rules (descriptive vs prescriptive usage)	Understands that grammar conventions differ in different forms of English (eg in different countries), and uses the appropriate conventions for more than one form of English	Understands how to work with grammar that has been used unconventionally for a particular effect
	Is aware of how words are conventionally used and combined in practice in the English language	Understands how words are conventionally used and combined, and when content needs to be adapted to different audiences and contexts (eg media, channels)	Adapts English usage to suit the audience and context	Can advise on appropriate English usage in editorial projects, depending on audience and context

	Exploring	Emerging	Experienced	Expert
Grammar and the use of English	Understands that language changes over time, and the implications for editorial work Is aware that words and phrases may become more or less acceptable over time and depending on context	Understands that language changes at different rates in different contexts, and adapts their editing to a given project Queries and suggests solutions to potentially problematic words and phrases depending on context	Stays up to date with changes and developments in language, in order to work appropriately in different contexts Can advise on how to ensure language used reflects developments, or signposts to an appropriate source	Recommends the appropriate point to adopt changes in language and how to determine which changes are appropriate to adopt Advocates for the importance of particular changes and developments in language (eg inclusive language)
	Is aware of the need to use inclusive, conscious and plain language	Understands the principles of using inclusive, conscious and plain language and how they apply to professional practice and communication	Follows the principles of inclusive, conscious and plain language in their professional practice and communication	Advocates for the use of inclusive, conscious and plain language in professional practice and communication

	Exploring	Emerging	Experienced	Expert
Spelling, punctuation and symbols	Applies at least a basic understanding of English spelling and punctuation	Applies a good understanding of English spelling and punctuation	Applies an extensive understanding of English spelling and punctuation	Can explain English spelling and punctuation conventions
	Is aware that spelling, hyphenation and capitalisation alternatives exist (eg adviser/advisor, health care/healthcare, e-mail/email, Internet/internet) and ensures consistency in a project	Understands the appropriate use of spelling, hyphenation and capitalisation options and the need to be flexible in their selection	Makes appropriate decisions on spelling, hyphenation and capitalisation alternatives in consultation with relevant parties	Recommends appropriate spelling, hyphenation and capitalisation choices when developing a house style
	Understands that spelling, hyphenation and punctuation vary in different forms of English (eg in different countries)	Employs appropriate spelling, hyphenation and punctuation for more than one form of English	Can advise on appropriate spelling, hyphenation and punctuation for different forms of English	
	Identifies symbols (eg mathematical, measurements, currencies) and inconsistent usage of them	Ensures consistent and accurate usage of relevant symbols	Recommends how to use symbols accurately	

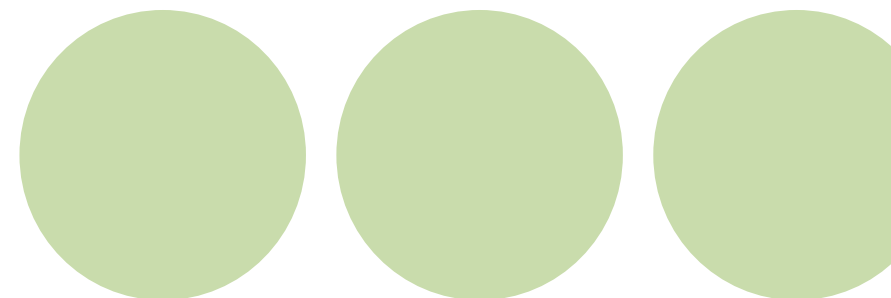|	Exploring	Emerging	Experienced	Expert
Spelling, punctuation and symbols	Understands use of short forms ('Harvard' for Harvard University), abbreviations ('ed.' for editor) and contractions ('Dr' for doctor), and how this can vary	Uses short forms, abbreviations and contractions as appropriate Is aware of non-English abbreviations (eg ibid, et al, sic)	Understands and uses non-English abbreviations correctly	Recommends when an English term may be more helpful to the reader than a non-English abbreviation

	Exploring	Emerging	Experienced	Expert
Voice and tone	Is aware that voice and tone – readability (complexity of language), register (degree of formality), use of terminology – should be appropriate to the type of publication and audience	Understands how voice and tone can be adjusted so they are appropriate to the type of publication and audience	Adapts voice and tone for a variety of types of publications and audiences	Can explain how to adapt voice and tone to match the type of publication and audience
References, bibliographies, citations, notes and quotations	Is aware that different referencing systems exist	Applies good working knowledge of at least one referencing system	Applies good working knowledge of short-title, author–date (Harvard) and author–number (Vancouver) systems	Has comprehensive knowledge of short-title, author–date (Harvard) and author–number (Vancouver) systems
	Is aware that, within a particular referencing system, the required presentation style (eg order of information, punctuation, elision, capitalisation, use of italic and bold) and order of references may vary Styles references to common types of publications (books, chapters, journal articles, web pages) according to a brief or project style sheet	Styles references correctly to follow a standard style guide (eg *Chicago Manual of Style, MLA, APA*) when detailed examples are not supplied in the brief	Styles common reference types correctly for a variety of style guides and referencing systems	Styles references to unusual types of material (eg archival material, social media posts, audiovisual material) correctly for a variety of style guides and referencing systems Can advise on how to handle references to unusual types of material

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	Exploring	Emerging	Experienced	Expert
References, bibliographies, citations, notes and quotations	Understands the different purposes of a bibliography and a reference list Orders a simple bibliography or reference list according to the brief provided	Orders a bibliography or reference list with complex features (eg multiple authors with the same surname, authors with more than one publication in a given year)	Organises a bibliography or reference list with multiple different kinds of material (eg archival, primary source, secondary source, audiovisual, internet)	Recommends methods for organising complex bibliographies and reference lists
	Knows the difference between a citation (details of a source or authority) and a quotation (wording from a source or authority) Understands the need to cross-check between citations and a reference list or bibliography for consistency Styles straightforward text citations to match examples in a brief or project style sheet	Cross-checks between citations and a reference list or bibliography, and raises queries if there are discrepancies Styles straightforward text citations correctly to follow a standard style guide (eg *Chicago Manual of Style*, MLA, APA) when detailed examples are not supplied in the brief	Styles complex citations (eg where there is no clear author) correctly for a variety of standard style guides Resolves simple inconsistencies between citations and a reference list or bibliography	Is able to resolve all inconsistencies between citations and a reference list or bibliography

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	Exploring	Emerging	Experienced	Expert
References, bibliographies, citations, notes and quotations	Understands the purpose of footnotes and endnotes Understands the need to cross-check references in notes with a reference list or bibliography for consistency	Styles footnotes and endnotes correctly in at least one style, and raises queries where necessary Cross-checks references in notes with a reference list or bibliography, and raises queries if there are discrepancies	Identifies and queries issues related to footnotes and endnotes (eg notes incorrectly placed, overuse of multiple notes in a short space)	Resolves issues related to footnotes and endnotes (eg notes incorrectly placed, overuse of multiple notes in a short space)
	Identifies which quotations can be left in running text and which need to be displayed (set in a separate paragraph) Understands which elements of a quotation must not be altered (spelling, grammar, italics, punctuation other than quote marks and dashes)	Marks up quotations correctly for typesetting (through coding or Word styles) Styles editorial comments and interventions (eg glosses, use of 'sic') in quotations correctly (square brackets etc)	Raises queries about potentially incorrectly transcribed material in quotations and, where appropriate, checks against a reliable source to verify their accuracy	Can advise on sources which can reliably be used to verify the accuracy of quoted material

	Exploring	Emerging	Experienced	Expert
Numeracy and presentation of numerical data	Is aware of style choices to be made in presenting numerical data (numbers, percentages, measurements, statistical data, currency amounts, dates) and the need to apply them consistently	Understands common conventions for presenting numerical data	Consistently applies appropriate conventions for presenting numerical data	
	Checks arithmetic (addition, subtraction, multiplication and division) and understands the importance of not making changes without raising queries to identify where the error is Is aware of the need to check calculations and graphs, and deal with statistical data	Checks averages, areas, percentages and graphs, deals with statistical data as needed, and raises queries where appropriate	Suggests solutions for issues relating to arithmetic, percentages, graphs, averages and statistical data	
	Is aware of the difference between metric and imperial units	Understands metric and imperial units, and ensures consistency in usage throughout a project Is able to use appropriate tools to convert between metric and imperial units		
	Identifies roman numerals and inconsistent usage of them	Ensures accurate and appropriate usage of roman numerals		

	Exploring	Emerging	Experienced	Expert
Numeracy and presentation of numerical data	Checks for errors in scale (eg number much too large, incorrect unit used) in recipes, medicine dosages etc	Raises queries and suggests possible solutions for significant errors in scale		Can advise on how to identify potential errors in scale
	Checks usage of common SI units (eg metre, kilogram, ampere, Kelvin)	Corrects or queries errors and inconsistencies in the usage of common SI units		

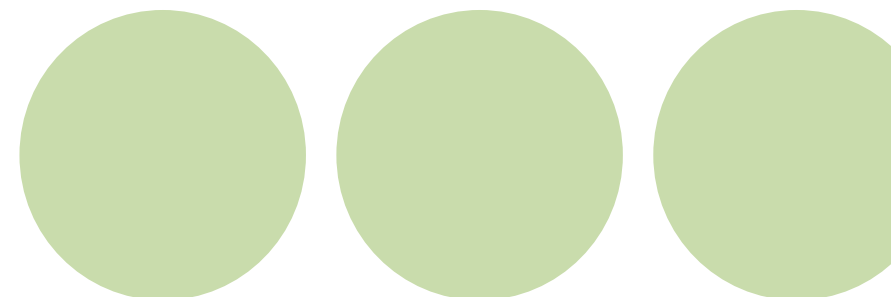|	Exploring	Emerging	Experienced	Expert
Non-textual forms	Understands differences between non-textual forms (eg tables, graphs, maps, photographs, line drawings)	Understands common conventions for displaying information in non-textual forms	Provides clear instructions on non-textual forms to the typesetter or designer where needed	Recommends appropriate non-textual forms for a given context
	Checks that non-textual forms match associated text and caption or heading (eg numbers in tables and charts match those in surrounding text, images match the information in the caption)	Raises queries about discrepancies between text and non-textual forms as necessary	Suggests solutions to problems relating to discrepancies between text and non-textual forms	Can advise on how to resolve problems relating to discrepancies between text and non-textual forms
	Is aware that source citations and/or reprint permission may be required for non-textual forms	Checks that any source citations are formatted correctly and queries whether necessary permissions have been obtained	Queries potentially missing source citations and permissions	

	Exploring	Emerging	Experienced	Expert
Non-textual forms	Understands common conventions for numbering of non-textual forms (sequential; usually different sets for each form), for references to them in the text and for their placement in relation to the surrounding text Checks that numbering schemes consistently continue throughout a document or restart with each section	Checks that numbering is sequential for each type of non-textual form, and that it matches the references in the text, and renumbers or raises queries as necessary Indicates to the typesetter or designer where non-textual forms should be placed	Suggests solutions to problems in numbering and placement of non-textual forms, and references to them in the text Recommends appropriate numbering schemes	

	Exploring	Emerging	Experienced	Expert
Tables	Checks formatting of tables for consistency	Understands common conventions for presenting data in tables (eg alignment of numbers, presentation of units of measure, use of notes)	Designs, populates and modifies tables in Word and converts authors' presentations of data into tables	Can recommend appropriate presentation of data in tables
	Checks table notes and understands that they are separate from endnotes or footnotes	Queries or inserts missing table notes as appropriate		
	Checks consistency of data in a table, and in relation to the text and table heading	Queries problems with data in tables, and discrepancies between table data, text and table headings	Suggests solutions to problems with data in tables, and to discrepancies between table data, text and table headings	Can advise on how to resolve problems with data in tables, and discrepancies between table data, text and table headings

	Exploring	Emerging	Experienced	Expert
Charts and graphs	Is aware that certain types of charts and graphs are more or less appropriate depending on the data they represent	Is familiar with the most appropriate chart/graph type for different types of data (eg pie, bar, line)	Is familiar with chart and graph types that are appropriate for more complex data sets (eg scatter plot, box plot, heatmap)	Recommends appropriate chart and/or graph types depending on the data set
	Is aware that it is not always possible to amend a chart or graph directly Raises queries about possible problems with this	Clearly summarises what changes need to be made to a chart or graph	Differentiates between essential changes (eg factual inaccuracies) and those which are desirable but not essential (eg stylistic amendments)	Can advise on the types of changes that may be essential and those that may be only desirable
	Checks information in charts and graphs (eg labels, units, spelling, style, anomalous data points)	Raises queries about possible problems in a chart or graph	Suggests potential solutions for problems in a chart or graph	

	Exploring	Emerging	Experienced	Expert
Charts and graphs	Is aware that charts and graphs should follow accessibility guidelines (eg clear fonts, suitable text size, appropriate colour choices, no unnecessary visual clutter)

Identifies issues with colour charts and graphs that will be printed in black and white | Checks that charts and graphs follow accessibility guidelines and raises queries if necessary

Suggests solutions for colour charts and graphs that will be printed in black and white (eg use of patterning, graph lines shown by style of line) | Suggests solutions to improve accessibility of charts and graphs | Keeps up to date with best practice in making charts and graphs accessible |
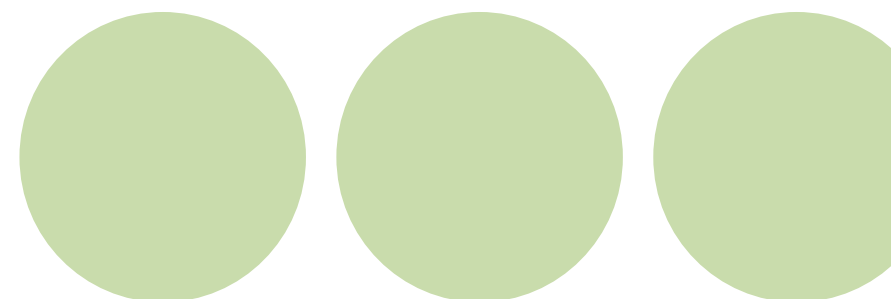| | Is aware that chart/graph sizing and placement in a document should not cause layout issues (eg a pie chart that splits over two pages), that all charts and graphs should be styled consistently, and that image resolution should meet publication requirements | Checks whether chart/graph sizing and placement in a document will cause a layout issue, that all charts and graphs are styled consistently, and that image resolution meets publication requirements, and raises queries as appropriate | Recommends alternative chart/graph placement and chart/graph styles that meet a document's and reader's needs | |

	Exploring	Emerging	Experienced	Expert
Illustrative materials	Is aware that different contexts and types of media require different image formats (eg JPEG, PNG, TIFF, EPS, BMP, GIF), resolutions and sizes	Finds accurate information on the appropriate image resolution and size for a project	Identifies and queries problems with image resolution and size, and references appropriate sources of information	Recommends solutions to problems with image resolution and size for different kinds of illustration
		Marks up images and slide shows in appropriate software (eg Canva, Photoshop, PowerPoint)	Edits text in different image formats as needed (eg Canva, Photoshop)	
	Checks elements typically found on a map (eg scale, legend, compass) and identifies inconsistencies between a map and text	Identifies and queries missing or inconsistent elements on a map, and inconsistencies between a map and text	Suggests solutions for missing or inconsistent elements on a map, and inconsistencies between a map and text	
	Is aware of the use of captions with illustrations Identifies inconsistencies between captions, illustrations and text	Identifies and raises queries about missing elements in an illustration, or inconsistencies between captions, illustrations and text	Suggests solutions to problems with illustrations and captions	
	Is aware that images have a copyright holder and may need an appropriate credit line	Identifies images that might need copyright permission and raises the necessary queries	Understands the differences between types of public copyright licences and how they can be used	Can list potential copyright issues relating to images

	Exploring	Emerging	Experienced	Expert
Illustrative materials	Is aware of issues that may occur when colour images are printed in black and white (eg text over image)	Identifies issues with colour images that will be printed in black and white	Suggests solutions for colour images printed in black and white (eg changing text colour, or moving text out of the image)	

	Exploring	Emerging	Experienced	Expert
Use of non-English languages and non-Latin alphabets	Recognises characters from non-Latin alphabets (eg Greek, Cyrillic)	Uses tools such as symbol tables (eg Character Map) to input individual non-Latin characters and flags these for the typesetter or designer	Inputs, and identifies possible issues with, text in non-Latin alphabets, and queries as necessary	
	Recognises diacritics (eg accents, umlauts, cedillas) and common non-English characters (eg ø, ð, ß)	Inputs diacritics and common non-English characters using tools (eg symbol tables) or keyboard shortcuts	Provides information for the typesetter or designer regarding diacritics and common non-English characters	Can advise on using appropriate diacritics and common non-English characters, and how to input them
	Is aware that non-Latin-alphabet text can be presented in the Latin alphabet using transliterations and transcriptions	Understands that transliterations and transcriptions may produce differing results in the Latin alphabet	Identifies inconsistencies in transliterations and transcriptions, and raise queries as necessary	
	Is aware of common non-English terms and names, and the need to check they are presented correctly	Understands that non-English languages have different systems of capitalisation, diacritics and punctuation	Checks against a reliable source that non-English terms and names are correct, including checking for capitalisation, diacritics, proper tense, inflection and punctuation	Can advise on how to verify accuracy of non-English terms and names

	Exploring	Emerging	Experienced	Expert
Use of non-English languages and non-Latin alphabets	Is aware of non-English terms that have been assimilated into English (eg déjà vu, verboten, al dente)	Understands the use of italics to differentiate non-English terms that have not been assimilated into English	Uses formatting consistently for non-English terms that have not been assimilated into English	Can recommend appropriate formatting for non-English terms

	Exploring	Emerging	Experienced	Expert
Sources of information	Understands how and where to check relevant factual information Is aware that some information sources, particularly online, are less reliable than others or may be outdated	Assesses reliability of information sources, particularly online	Makes informed suggestions for factual changes backed by reliable sources	Can advise on how to identify reliable information sources and how to use them to make informed suggestions for factual changes
	Uses main reference resources (eg dictionaries, thesauri, atlases) to support their work	Uses a wide range of reference resources (eg style guides, online library catalogues such as British Library, Jisc Library Hub Discover) to support their work	Uses corpora (eg Corpus of Contemporary American English, British National Corpus) to support their work	Can advise on relevant reference resources for editorial work and how to use them
Indexes	Is aware of what an index is and what a professional indexer does	Understands the structure of a standard index (entries, subentries, cross-references) Checks that index entries are correct (eg spot-checking page references, checking for correct ordering) Understands how far an editorial professional is expected to check and correct a professionally produced index	Checks that an index follows good practice (eg conventions for ordering entries) Is aware of different approaches to checking indexes prepared by professional indexers and those prepared by others (eg authors) Edits an author-generated index, checks for potential issues (eg consistency of entry structuring) and raises queries where appropriate	

Editorial knowledge and practice
Editorial judgement

Editorial judgement includes judgement of language, factual information and voice; clarity in text; and the purpose of, and good practices associated with, querying (the process of raising questions with, seeking clarification from or making suggestions to an author or client about specific parts of a piece of content). These are important at all levels and mean:

- being able to identify where intervention may affect the text's meaning, and where querying is more appropriate than making a change;
- understanding the importance of retaining the appropriate meaning and language for the intended audience and context, depending on your role as proofreader, copyeditor, line editor or developmental editor;
- understanding the purpose of querying, and being aware of the impact that a query may have on professional communications, relationships, scheduling and project management.

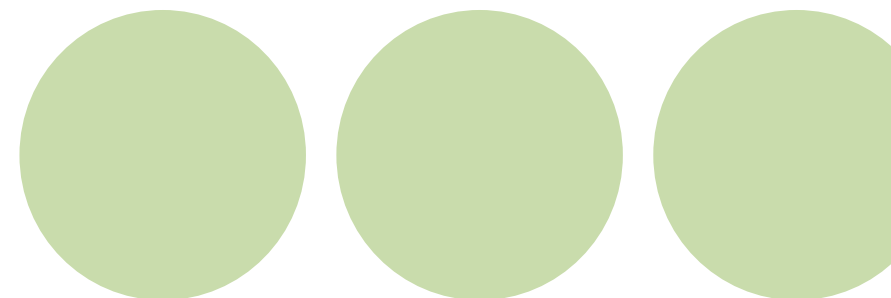|	Exploring	Emerging	Experienced	Expert
Editorial judgement	Is aware that all text can benefit from editing and what these benefits are	Assesses whether text is clear, concise, consistent, correct, coherent, complete and credible	Edits text to ensure it is clear, concise, consistent, correct, coherent, complete and credible	Performs an overall assessment of whether a text is clear, concise, consistent, correct, coherent, complete and credible, and recommends improvements at a general level
	Is aware that editorial judgement must be applied when deciding on the appropriate level of intervention, and of the importance of sticking to guidance in the brief about the level of intervention	Understands the need not to intervene more than is necessary	Applies an appropriate level of intervention	Judges the appropriate level of intervention required and applies it consistently

	Exploring	Emerging	Experienced	Expert
Judgement of language and factual information	Checks for issues with readily verifiable facts (eg dates for significant historical events, location names), and knows where to find the correct information	Understands when it is appropriate to raise a query about factual material	Amends factual material or raises a query as appropriate Raises concerns about repeated factual inaccuracies in a project and communicates these concerns to appropriate contacts	Can advise on handling issues with factual material and how to decide whether it is appropriate to amend the text or raise a query
	Recognises commonly misused idioms and phrases (eg should of/should have), and commonly confused words (eg principal/principle, accept/except, affect/effect)	Queries commonly misused idioms and phrases, and commonly confused words	Identifies and corrects a wide range of misused idioms, phrases and words, and justifies those corrections	Identifies and resolves or queries issues with translations of non-English idioms Can advise on how to identify or correct potentially misused idioms, phrases and words

	Exploring	Emerging	Experienced	Expert
Judgement of voice	Is aware that material needs to be appropriate for the intended audience and context	Checks the appropriateness of material for the intended audience and context	Amends material so that it is appropriate for the intended audience and context, or queries if needed	Amends material so that it is appropriate for a range of intended audiences and contexts, or raises queries if needed
	Understands what is meant by the 'author's voice' (the writer's personal style, tone, language, point of view, perspective and writing style), and is aware of the need to respect it, depending on the context	Respects the author's voice when changing text, and assesses whether the tone is appropriate for the context and target audience	Judges the extent to which the author's voice should be respected when changing text, and tailors the approach to the work accordingly	Recommends when extensive rewording may be needed to adapt the author's voice to the intended audience Can advise on how to make appropriate changes to the text while respecting the author's voice
	Is aware of the need to flag potentially problematic content (eg stereotypical depictions) or inappropriate content (eg personal views or opinions that are not relevant to the context or audience)	Raises queries about potentially problematic or inappropriate content	Suggests solutions to potentially problematic or inappropriate content	Provides guidance on handling potentially problematic or inappropriate content Stays up to date with developments and changes in what is considered potentially problematic or inappropriate for different contexts

	Exploring	Emerging	Experienced	Expert
Clarity in text	Is aware that a text may need to be rephrased to simplify or clarify meaning	Raises queries and suggests solutions on how to rephrase and restructure parts of a text to simplify or clarify meaning	Restructures a text to simplify or clarify meaning	Can advise on how to rephrase or restructure text that needs to be simplified or clarified
	Recognises ambiguity and understands the need to avoid it	Raises queries to identify ambiguity	Can suggest how to resolve unintentional ambiguity in text	
	Is aware of the need to eliminate unwanted repetition and redundant words and phrases while considering the potential consequences for the text as a whole	Eliminates redundancy and repetition in wording without adversely affecting meaning, emphasis or readability	Restructures a text to avoid unwanted repetition or redundant words and phrases	
	Is aware that modifying text to fit a given word length can introduce problems such as ambiguity, redundant words or phrases and repetition	Understands how to modify a text to fit a given word length or section without introducing problems	Modifies a text to fit a given word length or section	Can advise on strategies for modifying a text to fit a given word length or section

	Exploring	Emerging	Experienced	Expert
How to query	Is aware of the need to raise queries about possible problems in a piece of text (eg unclear meaning, factual discrepancies, errors and omissions)	Understands how and when to raise queries and how many are appropriate	Understands which changes should be accompanied by queries to ask for confirmation Uses good practice when raising queries (eg collating non-urgent queries for the end of a project)	Can advise on when to query and the appropriate number of queries for the context
	Is aware that queries can include suggesting potential solutions where appropriate	Suggests potential solutions alongside queries where appropriate	Can advise on how to phrase potential solutions and when it is appropriate to do so	
	Is polite and professional in phrasing queries	Phrases queries clearly, concisely, constructively and sensitively	Raises queries in an appropriate and sensitive manner	Adapts their approach to querying based on their understanding of their client or colleague's communication preferences and requirements
	Is aware that queries may need to be raised with multiple contacts, such as author, project manager, designer or typesetter	Understands what kinds of queries to raise with different contacts, such as author, project manager, designer or typesetter	Sends the relevant queries and instructions to the appropriate contact	Liaises with multiple contacts to resolve queries, and can advise on how to do so

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	Exploring	Emerging	Experienced	Expert
How to query	Is aware of the impact that queries might have on schedules and budgets, such as the time needed for the author or client to respond	Understands how to keep queries within the limits of schedule and budget	Is economical in the number and complexity of queries, bearing in mind the schedule, the budget and the availability of the people who will need to respond	
	Is aware of the need to prioritise the reader's viewpoint, knowledge, sensitivities and background when raising queries	Understands how to prioritise the reader's viewpoint, knowledge, sensitivities and background when raising queries	Suggests solutions that prioritise the reader's viewpoint, knowledge, sensitivities and background	Advocates for the importance of using sensitivity readers in order to prioritise the reader's viewpoint, knowledge, sensitivities and background

Editorial knowledge and practice
Editorial practice

This covers the application of editorial work through markup (the signs and text that indicate amendments to be made) in different types of proofreading and editing work, such as proofreading against copy, proof-editing and editing in Word. Methods of marking up projects may vary across different techniques and software but the fundamentals remain the same:

- employing relevant approaches to identify, clean up and find solutions for errors
- having a good understanding of what briefs, style guidelines and project style sheets are, their purpose and how to use them.

	Exploring	Emerging	Experienced	Expert
Markup	Is aware of different methods available for marking up documents (adding signs and text to copy or a proof to indicate amendments to be made) (eg Track Changes in Word, Adobe Acrobat for PDFs) Explores options available for marking up	Marks up projects using appropriate tools and good practices (eg appropriate marks on hard copy, commenting tools in Adobe Acrobat, Track Changes in Word)	Adapts to different needs for marking up projects, such as using highlighting instead of or in addition to comments, or using conventional proofreading marks on hard copy	Recommends the best method for marking up a particular project effectively
	Is aware of at least one widely used set of proof correction marks, such as BS 5261 or ISO 5776	Uses at least one widely used set of proof correction marks in an agreed format (eg hard copy, PDF stamps)	Interprets or queries non-standard proof correction marks (eg used by authors)	

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	Exploring	Emerging	Experienced	Expert
Markup	When marking up PDF files, is able to use commenting tools, such as those in Adobe Acrobat, or other methods	Can follow the requested method of marking up PDF files, such as using highlighting or commenting tools Checks off comments in a PDF file to identify which comments have been resolved	Sorts and navigates comments (eg searching, filtering by different users or colours) in a PDF file	Uses a range of programs and tools for marking up PDF documents as required
	When editing in a word-processing program, is aware of how to indicate amendments to a text (eg Track Changes in Word, Suggesting in Google Docs)	Uses Track Changes in Word and similar features, and is aware of the advantages of making some basic changes silently (eg removing unwanted spacing, changing quotation marks)	Uses Track Changes in Word and other change-tracking features efficiently, and knows what changes can be made silently Compares different versions of a document using change tracking (eg Compare Documents in Word) or version history	Can advise on how to use Track Changes in Word and similar features efficiently, and when changes can be made silently
	When working in Word, is aware of the need to clean up a text at the beginning of a project (eg eliminating unwanted spacing and tabs)	Cleans up a text at the beginning of a project	Runs automated routines to clean up a text	Makes informed decisions about the best order in which to run routines to clean up a text

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|	Exploring	Emerging	Experienced	Expert
Markup	Is aware of the use of manual coding (eg <Chapter Head>, <Figure Caption>, <A Head>) and Word styles to guide the typesetter in formatting the text	Uses manual coding or Word styles to guide the typesetter in formatting the text	Uses character styles, list styles and paragraph styles in Word to guide the typesetter in formatting the text Creates Word styles as necessary for a project	Creates templates that incorporate desired character and paragraph styles
	Is aware that information and instructions for different contacts (eg author, typesetter) need to be clearly differentiated (eg using colour coding)	Follows the requested system for showing the distinction between queries for different contacts and typesetting instructions	Adapts to different needs for showing the distinction between queries and typesetting instructions, such as compiling queries in a separate document or using comments or highlighting	

	Exploring	Emerging	Experienced	Expert
Structural issues	Is aware that any project may contain structural issues (eg missing chapters, duplicated material)	Identifies and queries structural issues	Suggests possible solutions to deal with structural issues	
	Is aware that it is important that a piece of text follows a logical structure in order for it to convey the intended meaning	Identifies whether a piece of text is structured logically and raises queries as appropriate	Identifies whether a piece of text expresses the intended meaning correctly and flows logically, with the ideas and wording easy to follow and no gaps in the logic	Adjusts text so that it is well expressed and flows logically
Briefs	Understands the importance of following a brief Follows a brief and raises queries about it where necessary	Is familiar with the typical contents of an editorial brief (eg house style, deadline, communication preferences) and queries potentially missing instructions and material	Follows brief when appropriate, but uses sound judgement in deciding whether to deviate from it or discuss potential amendments to it	Works to a wide range of briefs from a variety of clients, and suggests ways of resolving missing instructions and material
Proofreading against copy vs cold proofreading	Understands the difference between proofreading against copy (referring to an earlier version, such as the copyeditor's Word file) and cold proofreading (with no reference to an earlier version) Carries out a cold proofread	Proofreads against marked-up copy	Resolves or raises queries about conflicts between marked-up copy and proofs as appropriate	Can advise on how to resolve or raise queries about conflicts between marked-up copy and proofs as appropriate

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	Exploring	Emerging	Experienced	Expert
Checking layouts	Is aware of the importance of checking layouts at proof stage (eg page numbers, running heads, justification)	Checks and marks up required changes to page layouts in a proofread	When making or suggesting changes to text in a proofread, assesses whether they may create problems with page layout (eg whether there is enough space on the page)	Makes recommendations for resolving page layout problems
Proof collation	Is aware of what proof collation is	Understands how to collate proofs	Collates marked-up proofs, including querying or resolving conflicts between them	Can advise on how to collate proofs and how to resolve conflicts in collated corrections
Proof-editing	Is aware that proof-editing involves changing text beyond a standard proofread and less than a standard copyedit	Recognises when a project requires proof-editing versus proofreading and can perform a proof-edit	Can advise on when and how to perform a proof-edit	

	Exploring	Emerging	Experienced	Expert
Style guidelines	Understands that style guidelines ('house style') outline choices to be made (eg capitalisation, hyphenation, formatting, presentation of numbers and dates, variant spellings)	Follows a set of style guidelines Is familiar with typical contents of style guidelines and queries potentially missing content	Judges when it is not appropriate to apply particular aspects of the specified style (eg referencing guidelines)	Makes recommendations on how to create or amend style guidelines
	Is aware of common style variations (eg date formats, title case vs sentence case, single vs double quotes)	Is aware that published style guides (eg *Chicago Manual of Style*, *New Hart's Rules*) are widely used but aren't always applicable	Judges when it is not appropriate to apply particular aspects of a published style guide (eg US style for UK publications that use *Chicago Manual of Style*)	Makes recommendations on how to adapt the rules of a published style guide
	Understands that style guidelines are used to create consistency and to establish branding, tone and style	Understands how to develop, maintain and adapt a set of style guidelines for long-term or repeat projects	Creates, develops, maintains and adapts a style guide for long-term or repeat projects, based on examining published documents and assessing which style choices would be most appropriate	Reviews or writes a style guide for an organisation, based on examining published documents and assessing which style choices would be suited to the organisation's needs

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	Exploring	Emerging	Experienced	Expert
Project style sheets	Is aware that a project style sheet tracks and compiles style choices for a project, as opposed to style guidelines, which set out style choices for a client or organisation	Understands the typical contents of a project style sheet: what can be expected, what is usually essential and what could be included	Uses and creates multiple style sheets or a single complex style sheet for one project, such as fiction, timeline and illustration style sheets Determines when a style sheet isn't necessary for a project (eg for very short documents)	Advocates for the importance of style sheets in all types of projects
	Follows a project style sheet	Follows, updates and creates a project style sheet	Organises a style sheet for increased efficiency (eg using headings, paragraph styles or bookmarks in a Word file)	Can advise on how to create, update or improve style sheets
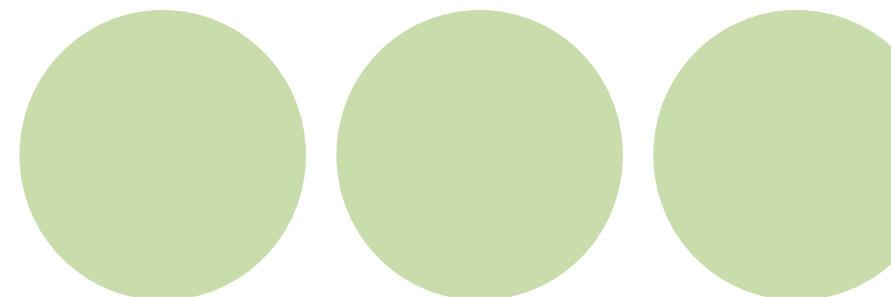
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