



Chartered  
Institute of  
Editing and  
Proofreading

# Curriculum for Professional Development

for editors and proofreaders

[ciep.uk](http://ciep.uk)

© 2021 Chartered Institute of Editing and Proofreading

Edited by Jane Moody, training director ([training@ciep.uk](mailto:training@ciep.uk))

Proofread by Judith Paskin

Version 1.5. Last updated 27 April 2021

# Contents

<b>THE CURRICULUM</b>	<b>V</b>
An introductory note	v
Domains	v
Resources to support learning/CPD	vi
Curriculum feedback and development	vii
Abbreviations used in this document	vii
<b>DOMAINS</b>	<b>VIII</b>
1 Working as a professional	viii
2 Editorial knowledge and practice	viii
3 Specialist skills and knowledge	ix
<b>1 WORKING AS A PROFESSIONAL</b>	<b>1</b>
1.1 Professional practice and ethics	1
1.2 Business management and practice	5
1.3 Equipment and file/document management	9
<b>2 EDITORIAL KNOWLEDGE AND PRACTICE</b>	<b>11</b>
2.1 Publishing	11
2.2 Editorial knowledge	16
2.3 Editorial judgement	22
2.4 Editorial practice	25
<b>3 SPECIALIST SKILLS AND KNOWLEDGE</b>	<b>28</b>
3.1 Fiction	29
3.2 Scientific and medical publishing	30
3.3 Technical communications	33

<b>3.4 Legal publishing</b>	<b>34</b>
<b>3.5 Music publishing</b>	<b>36</b>



# The curriculum

## An introductory note

Throughout the curriculum and our training courses, we use the term ‘publishing’ in its broadest sense to include the production by any means of written material produced by any individual person, group or organisation for ‘public’ consumption.

We all work in publishing, but we do not all work for a traditional publishing company or within a dedicated publishing team. Anyone who produces written or electronic material for others to use for whatever purpose is still publishing. Our skills and processes are adapted to the particular needs of our client, whether that be a traditional publishing company or any other organisation or individual that produces material in print or online.

This curriculum has been developed to outline the range of skills and knowledge that editors and proofreaders use in their professional life. Not all editors/proofreaders will use all the skills and knowledge included here in their day-to-day work. However, awareness of other processes and skills outside this narrow focus, an in-depth knowledge of the profession in general, and acquisition of a broad range of skills are all essential for the continuing professional development of all members.

### *Employment status*

Some CIEP members will not be working as freelancers so there will be some aspects of subdomain 1.2 (business management and practice) that may not be immediately relevant to these members. The knowledge in this subdomain will, however, be useful to most members working in the profession.

## Domains

The curriculum is divided into three domains:

1. Working as a professional
2. Editorial knowledge and practice
3. Specialist skills and knowledge.

**Domain 1** covers the professional life of an editor/proofreader. Domain 2 covers the core knowledge and skills that editors/proofreaders use in their practice. Domain 3 details the additional elements that editors/proofreaders need in specialist areas of work. It details some of the aspects of the work relating to some specialist fields. The list is not exhaustive and will be added to in future editions.

Each domain is divided into subdomains, and each of these includes specific topics.

Each topic includes information on:

- **Knowledge criteria:** what you need to know.
- **Editorial competencies, professional skills and attitudes:** how you perform tasks and how you demonstrate your awareness.
- **Resources to support learning/CPD:** resources and courses to help you develop these competencies.

We will add details of the ways that you can demonstrate competency (evidence/assessment) in future versions of this document.

### *Specialist skills and knowledge*

Some specialisms are listed in the curriculum. The list is not intended to be definitive; if you work in a particular specialism and you could contribute details for a section, please use the template on page 28 and send your draft to the training director ([training@ciep.uk](mailto:training@ciep.uk)) for consideration.

Some areas of work that could be added include: social sciences and humanities, educational publishing.

## Resources to support learning/CPD

In this column, we have listed some useful training courses, online resources and some hard-copy texts. It is not possible to include in this document all the resources that you might use to help you to develop.

Please do also refer to the additional resources on the CIEP website:

- CIEP Code of Practice
- CIEP Resources

We have listed CIEP guides, factsheets and position papers where they are relevant but please check the CIEP website for any further resources as they become available.

We have not listed the basic editorial texts that are included in the CIEP's list of Recommended reference books and resources, as you are likely to be familiar with them.

You might also like to look at the Publishing Training Centre website, where you will find a wide variety of courses in all aspects of publishing.

### *Style guides*

We have not listed published style guides, except where they are of particular relevance, but we recommend that you familiarise yourself with the most common guides. Many publishers and other organisations have their own style guides, which are also worth exploring.

Some commonly used style guides include:

- *Chicago Manual of Style*

- American Psychological Association *Publication Manual of the American Psychological Association*
- American Medical Association. *AMA Manual of Style: A guide for authors and editors*
- *The Economist Style Guide*
- University of Cambridge Editorial style guide
- Associated Press *The Associated Press Stylebook*
- Modern Humanities Research Association MHRA Style Guide

Do check that you are using the most recent edition of any published style guide.

## Curriculum feedback and development

The curriculum has been developed by practising editors. We will continually review the content in response to gradual changes in practice, so we greatly appreciate your feedback. Please email the training director ([training@ciep.uk](mailto:training@ciep.uk)) with your comments and suggestions.

## Abbreviations used in this document

ALPSP	Association of Learned and Professional Society Publishers (CIEP is a member organisation so courses can be booked at member rates)
APA	American Psychological Association
BS	British Standard
CE1	Copyediting 1: Introduction
CE2	Copyediting 2: Headway
CE3	Copyediting 3: Progress
CONSORT	Consolidated Standards of Reporting Trials
CPD	continuing professional development
CSE	Council of Science Editors
HMRC	Her Majesty's Revenue and Customs
ICMJE	International Committee of Medical Journal Editors
MS	Microsoft
OUP	Oxford University Press
PR1	Proofreading 1: Introduction
PR2	Proofreading 2: Headway
PR3	Proofreading 3: Progress
PRISMA	Preferred Reporting Items for Systematic Reviews and Meta-Analyses
PTC	Publishing Training Centre
SI	International System of Units
STROBE	Strengthening the Reporting of Observational Studies in Epidemiology



## Domains

### 1 Working as a professional

#### 1.1 Professional practice and ethics

- 1 Role and responsibilities of an editor/proofreader within a publishing team
- 2 Basic legal framework in publishing
- 3 Professional ethics
- 4 Professional communication and negotiation
- 5 Continuing professional development

#### 1.2 Business management and practice

- 1 Legal requirements for running a freelance business in the UK
- 2 Standard business practices
- 3 Record keeping and documentation
- 4 Time management and working to a schedule
- 5 Pricing, quoting and budgets
- 6 Marketing of services
- 7 Professional use of social media and the internet

#### 1.3 Equipment and file/document management

- 1 Electronic equipment and operating systems
- 2 Software
- 2 File management
- 3 File security

### 2 Editorial knowledge and practice

#### 2.1 Publishing/production

- 1 Workflows
- 2 Schedules and budgeting
- 3 Editorial processes
- 4 Production processes
- 5 Design, typography and typesetting
- 6 Printing and finishing
- 7 eBook formats
- 8 Tables and illustrative materials
- 9 Types of content
- 10 Parts of a publication
- 11 Different models of publishing

## 12 Principles of accessibility

### 2.2 *Editorial knowledge*

- 1 Grammar, punctuation and usage
- 2 Spelling
- 3 Voice and tone
- 4 Citations, references and bibliographies
- 5 Numeracy
- 6 Tables
- 7 Illustrations
- 8 Use of languages
- 9 Sources of information
- 10 Indexing

### 2.3 *Editorial judgement*

- 1 Judgement of sense
- 2 Judgement of voice
- 3 Clarity in writing
- 4 Author and client queries

### 2.4 *Editorial practice*

- 1 Markup
- 2 Editorial standards in context
- 3 Errors, omissions and other problems
- 4 Proofreader's remit
- 5 Copyeditor's remit
- 6 Proof-editing
- 7 Editorial brief
- 8 House style
- 9 Project style sheets
- 10 Managing an editorial project

## 3 Specialist skills and knowledge

### 3.1 *Fiction*

- 1 Liaison with the author
- 2 Assessment of the manuscript and brief
- 3 Structural editing
- 4 Line editing

### *3.2 Scientific and medical publishing*

- 1 Common conventions in scientific and medical writing
- 2 Creation and layout of tables, figures and graphs
- 3 Ethics in scientific and medical publishing
- 4 Common format and contents of a research article
- 5 Common reporting guidelines
- 6 Scientific and medical style guides

### *3.3 Technical communications*

- 1 Common conventions and standards in technical communications
- 2 Clarity in technical communications
- 3 Structural considerations in technical communications

### *3.4 Legal publishing*

- 1 Common conventions in legal writing
- 2 Legal style guides

### *3.5 Music publishing*

- 1 Common conventions and standards in music publishing
- 2 Role of the editor and proofreader in music publishing
- 3 Setting music
- 4 Music books and journals
- 5 Educational music books
- 6 Musical notation

# 1 Working as a professional

## 1.1 Professional practice and ethics

Demonstrates an understanding of:

- the place of the editor/proofreader within a publishing team
- the role and responsibilities of an editor/proofreader
- the basic legal framework in publishing
- professional ethics
- professional communication and negotiation
- the need for continuing professional development

Knowledge criteria	Editorial competencies, professional skills and attitudes	Resources to support learning/CPD
1.1.1 Role and responsibilities of an editor/proofreader within a publishing team	<ul style="list-style-type: none"> <li>• Understands publishing schedules and budgets, and how they interact</li> <li>• Is aware of the responsibilities of an editor to stakeholders and of the editor as an intermediary</li> <li>• Understands the place of an editor/proofreader in the publishing process</li> <li>• Is aware of own role within the team and able to work as part of a team</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP suite of courses Copyediting</li> <li>• CIEP suite of courses Proofreading</li> <li>• CIEP course Editorial Project Management</li> <li>• CIEP fact sheet <i>Good editorial relationships</i></li> <li>• Publishing Scotland Introduction to/Further Copy-editing courses</li> <li>• Publishing Scotland Introduction to/Further Proofreading courses</li> </ul>

Knowledge criteria	Editorial competencies, professional skills and attitudes	Resources to support learning/CPD
1.1.2 Basic legal framework in publishing	<ul style="list-style-type: none"> <li>• Is aware of legal aspects of publishing in general</li> <li>• Understands copyright ownership, public domain, licensing, moral rights, plagiarism, libel, privacy, obscenity, acknowledgements, permissions, data protection</li> <li>• Is alert to need to flag potential legal/ethical issues</li> <li>• Is aware of privacy and freedom of information legislation</li> <li>• Understands what information is legally required to appear in the type of publication they are working on</li> <li>• Understands legal deposit requirements</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP suite of courses Copyediting</li> <li>• CIEP suite of courses Proofreading</li> <li>• CIEP course Copyright for Editorial Professionals</li> <li>• CIEP course Editorial Project Management</li> <li>• CIEP guide <i>Editorial Project Management</i></li> <li>• H Jones &amp; C Benson <i>Publishing Law</i>, 5th ed. (Routledge, 2016)</li> <li>• L Owen (ed.) <i>Clark's Publishing Agreements</i>, 10th edn (Bloomsbury, 2017)</li> <li>• PTC guide <i>Publishers' Contracts</i>, by Kevin Stuart (2016)</li> </ul>
1.1.3 Professional ethics	<ul style="list-style-type: none"> <li>• Understands the need for confidentiality, objectivity, conflicts of interest (eg when working with university students on theses/dissertations)</li> <li>• Is alert to the impacts of offensive, biased or non-inclusive material</li> <li>• Understands the need to refuse work that they are not qualified to take on</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP suite of courses Copyediting</li> <li>• CIEP suite of courses Proofreading</li> <li>• CIEP course Editorial Project Management</li> <li>• CIEP course Proofreading Theses and Dissertations</li> <li>• CIEP guide <i>Proofreading Theses and Dissertations</i></li> <li>• CIEP fact sheet <i>Good editorial relationships</i></li> </ul>

Knowledge criteria	Editorial competencies, professional skills and attitudes	Resources to support learning/CPD
1.1.4 Professional communication and negotiation	<ul style="list-style-type: none"> <li>• Presents queries concisely and clearly giving adequate detail and proposing solutions where possible</li> <li>• Communicates politely and diplomatically</li> <li>• Avoids errors in grammar, spelling and punctuation in communications</li> <li>• Responds promptly</li> <li>• Raises queries or problems in time for them to be addressed within the schedule</li> <li>• Understands negotiating techniques and is capable of handling delicate negotiations appropriately</li> <li>• Is aware of the principles of accessibility in communications</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP course Editorial Project Management</li> <li>• CIEP course Plain English for Editors</li> <li>• CIEP guide <i>Editing into Plain Language</i></li> <li>• CIEP fact sheet <i>Good practice for author queries</i></li> <li>• CIEP fact sheet <i>Good editorial relationships</i></li> <li>• PTC e-learning modules: <ul style="list-style-type: none"> <li>○ A Commissioning Editor's Guide to Working with Authors</li> <li>○ Negotiating for a Win-Win Outcome</li> <li>○ Working with Authors</li> <li>○ A Copyeditor's Guide to Working with Authors</li> <li>○ A Copyeditor's Guide to Working with Typesetters</li> </ul> </li> <li>• B Sjolholm <i>An Editor's Guide to Working with Authors</i> (Rainforest Press, 2010)</li> <li>• S Barbour <i>The Copyeditor's Guide to Working with Indie Authors: How to find clients, market yourself and build your business</i> (ebook; Aeroplane Media, 2013)</li> <li>• Silberston, C. Writing accessible copy [blog post] <i>A Thousand Monkeys</i> 8 February 2019</li> </ul>

Knowledge criteria	Editorial competencies, professional skills and attitudes	Resources to support learning/CPD
1.1.5 Continuing professional development	<ul style="list-style-type: none"> <li>• Recognises the need for continual learning throughout career</li> <li>• Can demonstrate frequent continuing professional development and improvement of skills and knowledge</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP training courses</li> <li>• CIEP conference</li> <li>• PTC guide <i>Getting Ahead in Publishing</i> by Alastair Horne and Maria Vassilopoulos (2016)</li> <li>• PTC guide <i>Getting the Best from Self-Study</i> by Peter McKay (2016)</li> <li>• PTC courses</li> <li>• Publishing Scotland courses</li> </ul>

## 1.2 Business management and practice

Demonstrates an understanding of:

- the legal requirements for running a business
- standard business practices
- record keeping and documentation
- time management
- working to a budget
- pricing and quoting for a job
- marketing of services
- professional use of social media and internet

Knowledge criteria	Editorial competency, professional skills and attitudes	Resources to support learning/CPD
1.2.1 Legal requirements for running a business	<ul style="list-style-type: none"> <li>• Records income, allowable expenses and tax liabilities</li> <li>• Keeps relevant financial records</li> <li>• Understands the need to register a freelance business with domestic tax system (HMRC in the UK)</li> </ul>	<ul style="list-style-type: none"> <li>• HMRC (gov.uk) Help and support if you're self-employed</li> <li>• CIEP Going Solo Toolkit</li> </ul>
1.2.2 Standard business practices	<ul style="list-style-type: none"> <li>• Maintains business records and documentation</li> <li>• Can demonstrate good practice in use of author/editor agreements</li> <li>• Understands and uses terms and conditions</li> <li>• Understands basic formal and informal contracts</li> <li>• Is aware of non-disclosure agreements</li> <li>• Understands payment regimens</li> </ul>	<ul style="list-style-type: none"> <li>• Louise Harnby <i>Business Planning for Editorial Freelancers: A guide for new starters</i></li> <li>• CIEP Going Solo Toolkit</li> <li>• CIEP Contracts (including model terms and conditions) webpages</li> </ul>
1.2.3 Record keeping and documentation	<ul style="list-style-type: none"> <li>• Keeps record of matters agreed, documents handled, work done, changes made, decisions taken, queries, queries resolved/unresolved with replies</li> <li>• Understands and uses record-keeping system and follows good practice</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP Going Solo Toolkit</li> <li>• CIEP fact sheet <i>What will happen to my editorial business if I die?</i></li> </ul>



Knowledge criteria	Editorial competency, professional skills and attitudes	Resources to support learning/CPD
1.2.4 Time management and working to a schedule	<ul style="list-style-type: none"> <li>• Is aware of publication schedules</li> <li>• Is aware of tools designed to assist in time management</li> <li>• Understands and respects schedules and their budgeting implications</li> <li>• Understands the need to balance speed and quality</li> <li>• Is aware of work–life balance</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP suite of courses Copyediting</li> <li>• CIEP suite of courses Proofreading</li> <li>• CIEP course Editorial Project Management</li> <li>• CIEP guide <i>Editorial project management</i></li> <li>• CIEP Going Solo Toolkit</li> </ul>
1.2.5 Pricing, quoting and budgets	<ul style="list-style-type: none"> <li>• Has basic knowledge of budgeting in publishing</li> <li>• Has knowledge, through record keeping, of own speed and rate of work</li> <li>• Understands estimating/quoting for a job</li> <li>• Understands the need to balance cost and quality</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP suite of courses Copyediting</li> <li>• CIEP suite of courses Proofreading</li> <li>• CIEP course Editorial Project Management</li> <li>• CIEP guide <i>Editorial Project Management</i></li> <li>• CIEP guide <i>Pricing a Project: How to prepare a professional quotation</i></li> <li>• CIEP guide <i>Going Solo: Creating your freelance editorial business</i></li> <li>• CIEP Going Solo Toolkit</li> <li>• PTC guide <i>Finance in Publishing</i>, by Alan Hurcombe (2016)</li> </ul>

Knowledge criteria	Editorial competency, professional skills and attitudes	Resources to support learning/CPD
1.2.6 Marketing of services	<ul style="list-style-type: none"> <li>• Understands and correctly uses the CIEP membership logo and name of grade</li> <li>• Is aware of the importance of networking</li> <li>• Is aware of laws regarding spamming and unsolicited emails (eg GDPR in the UK and Europe)</li> <li>• Understands the uses of branding and identity for building a business</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP Going Solo Toolkit</li> <li>• CIEP guide <i>Marketing Yourself: Strategies to Promote Your Editorial Business</i></li> <li>• CIEP fact sheet <i>Getting your first clients</i></li> <li>• PTC course Introduction to Marketing</li> <li>• Barbour, S. <i>The Copyeditor's Guide to Working with Indie Authors: How to Find Clients, Market Yourself and Build Your Business</i> (ebook; Aeroplane Media, 2013)</li> <li>• Louise Harnby Marketing resource library</li> <li>• Louise Harnby <i>How to Brand Your Editing Business</i> (business skills guide)</li> <li>• Louise Harnby <i>Marketing Your Editing and Proofreading Business</i> (2014)</li> <li>• PTC guide <i>Marketing in the Digital Age</i> by Julia Garvey (2016)</li> <li>• John Espirian B2B web content writing</li> <li>• John Espirian Tips for writing web pages</li> </ul>

Knowledge criteria	Editorial competency, professional skills and attitudes	Resources to support learning/CPD
<p>1.2.7 Professional use of social media and internet</p>	<ul style="list-style-type: none"> <li>• Understands importance and uses of professional directories and business website for marketing of services</li> <li>• Understands and follows good practice in the use of social media</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP guide <i>Going Solo: Creating your freelance editorial business</i></li> <li>• CIEP Going Solo Toolkit</li> <li>• Sophie Playle course: The Visible Editor</li> <li>• Louise Harnby Social Media for Business Growth (course)</li> <li>• Louise Harnby Editor Website Essentials (course)</li> <li>• Louise Harnby Marketing Toolbox for Editors (course and book)</li> <li>• Louise Harnby Branding for Business Growth (course)</li> <li>• Louise Harnby <i>How to be Visible with Social Media</i> (business skills guide)</li> <li>• John Espirian B2B web content writing</li> <li>• John Espirian B2B blog &amp; LinkedIn article writing</li> <li>• John Espirian LinkedIn learner lounge</li> <li>• John Espirian Tips for writing web pages</li> </ul>

### 1.3 Equipment and file/document management

Can make appropriate use of:

- electronic equipment and operating systems
- software
- file management systems
- file security protocol

Knowledge criteria	Editorial competency, professional skills and attitudes	Resources to support learning/CPD
1.3.1 Electronic equipment and operating systems	<ul style="list-style-type: none"> <li>• Can work in at least one operating system</li> <li>• Is aware of and can use web browsers, email, file transfer protocol and other file transfer mechanisms (eg WeTransfer)</li> <li>• Keeps details of hardware and software used</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP course Word for Practical Editing</li> <li>• CIEP Going Solo Toolkit</li> </ul>
1.3.2 Software	<ul style="list-style-type: none"> <li>• Is aware of a variety of word-processing software</li> <li>• Is aware of a variety of typesetting software (eg InDesign, Quark Xpress)</li> <li>• Can use Microsoft (MS) Office programs: Word (especially Track Changes, styles and templates), Excel and PowerPoint (where appropriate)</li> <li>• Has ability to use Adobe Acrobat Reader (or equivalent) and comment tools</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP course Word for Practical Editing</li> <li>• CIEP fact sheet <i>Editing efficiency</i></li> <li>• CIEP fact sheet <i>Getting started with macros</i></li> <li>• CIEP Going Solo Toolkit</li> <li>• CIEP blog What's e-new? The efficient guide to Word, by Andy Coulson</li> <li>• Acrobat DC tutorials</li> <li>• Louise Harnby Formatting your book in Word: How to save time with the Styles tool <i>The Editing Blog</i>, 24 June 2019</li> <li>• PTC course Adobe Tools for Editors</li> </ul>

Knowledge criteria	Editorial competency, professional skills and attitudes	Resources to support learning/CPD
1.3.3 File management	<ul style="list-style-type: none"> <li>• Is aware of different file formats and able to save in a variety of formats</li> <li>• Applies good practice in file management, naming, versions and hierarchies</li> <li>• Is aware of file conversion and cross-platform problems</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP course Word for Practical Editing</li> <li>• CIEP fact sheet <i>Editing efficiency</i></li> <li>• Acrobat DC tutorials</li> <li>• CIEP Going Solo Toolkit</li> </ul>
1.3.4 File security	<ul style="list-style-type: none"> <li>• Understands and protects own and clients' electronic files against loss, corruption or confusion</li> <li>• Understands and applies good practice in saving versions of files, saving backups in multiple locations, regularly decluttering disk space</li> <li>• Understands the importance of and regularly runs adequate anti-virus and malware software and updates the software as appropriate</li> <li>• Understands the need to agree retention period and deletion of files and any confidential source material after completion and delivery of a project</li> <li>• Takes measures to purge files when disposing of an old computer</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP course Word for Practical Editing</li> <li>• CIEP guide <i>Going Solo: Creating your freelance editorial business</i></li> <li>• CIEP Going Solo Toolkit</li> </ul>

## 2 Editorial knowledge and practice

### 2.1 Publishing

Demonstrates an understanding of:

- workflows
- schedules and budgeting
- editorial processes
- production processes
- design, typography and typesetting
- printing and finishing
- eBook formats
- types of published material
- types of content
- different models of publishing
- tables and graphical materials
- principles of accessibility

Knowledge criteria	Editorial competency, professional skills and attitudes	Resources to support learning/CPD
2.1.1 Workflows	<ul style="list-style-type: none"> <li>• Understands the critical stages involved in any publishing process</li> <li>• Understands common publishing terminology</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP suite of courses Copyediting</li> <li>• CIEP suite of courses Proofreading</li> <li>• CIEP course Editorial Project Management</li> <li>• CIEP guide <i>Editorial Project Management</i></li> <li>• CIEP fact sheet <i>Publishing workflow</i></li> <li>• PTC e-learning module Introduction to Publishing</li> <li>• Publishing Scotland courses Introduction to/Further Copy-editing</li> <li>• Publishing Scotland courses Introduction to/Further Proofreading</li> </ul>

Knowledge criteria	Editorial competency, professional skills and attitudes	Resources to support learning/CPD
2.1.2 Schedules and budgeting	<ul style="list-style-type: none"> <li>Understands the importance of scheduling and budgeting within any publishing process</li> <li>Understands the influence of the schedule/budget on the scope of editing/proofreading</li> </ul>	<ul style="list-style-type: none"> <li>CIEP course Editorial Project Management</li> <li>CIEP fact sheet <i>Publishing workflow</i></li> <li>PTC course An Introduction to Digital Project Management</li> <li>PTC course Advanced Digital Project Management</li> </ul>
2.1.3 Editorial processes	<ul style="list-style-type: none"> <li>Understands the meaning and significance of common editorial terminology</li> <li>Understands the roles and responsibilities of members of an editorial team</li> <li>Understands the stages of the editorial process</li> </ul>	<ul style="list-style-type: none"> <li>CIEP suite of courses Copyediting</li> <li>CIEP suite of courses Proofreading</li> <li>CIEP course Editorial Project Management</li> <li>CIEP guide <i>Editorial Project Management</i></li> <li>CIEP fact sheet <i>Publishing workflow</i></li> <li>Publishing Scotland courses Introduction to/Further Copy-editing</li> <li>Publishing Scotland courses Introduction to/Further Proofreading</li> </ul>
2.1.4 Production processes	<ul style="list-style-type: none"> <li>Understands the roles and responsibilities of a production team</li> <li>Understands the meaning and use of common production terminology</li> <li>Understands the stages of the production process (eg prepress, print/electronic production)</li> </ul>	<ul style="list-style-type: none"> <li>CIEP guide <i>Editorial Project Management</i></li> <li>CIEP fact sheet <i>Publishing workflow</i></li> <li>M Mitchell &amp; S Wightman <i>Typographic Style Handbook</i> (MacLehose Press, 2017)</li> <li>PTC course An Introduction to Digital Project Management</li> <li>PTC course Advanced Digital Project Management</li> </ul>
2.1.5 Design, typography and typesetting	<ul style="list-style-type: none"> <li>Understands the meaning and application of common typographical terminology</li> <li>Is aware of different fonts, typefaces and their uses</li> <li>Recognises typographical characteristics: measures, alignment, spacing</li> </ul>	<ul style="list-style-type: none"> <li>M Mitchell &amp; S Wightman <i>Typographic Style Handbook</i> (MacLehose Press, 2017)</li> </ul>

Knowledge criteria	Editorial competency, professional skills and attitudes	Resources to support learning/CPD
	<ul style="list-style-type: none"> <li>• Understands word and character spacing, leading, indentation, non-breaking spaces, hyphens</li> <li>• Understands layout, typesetting and working with a typesetter (specification, layout, revises, running sheets)</li> </ul>	
2.1.6 Printing and finishing	<ul style="list-style-type: none"> <li>• Understands the requirements for different printing processes (colour, paper types, sizes, file sizes, resolution)</li> <li>• Is aware of different printing processes (eg litho, offset, digital, print on demand)</li> <li>• Is aware of different print finishes (eg sealer, varnishes, laminates)</li> <li>• Is aware of different binding methods (saddle-stitched, perfect binding, sewn, case binding, self-cover)</li> </ul>	
2.1.7 eBook formats	<ul style="list-style-type: none"> <li>• Is aware of different e-book formats (eg EPub, Amazon AZW, PDF, TXT, MOBI)</li> <li>• Has a basic understanding of which format to choose in different situations</li> </ul>	
2.1.8 Tables and illustrative materials	<ul style="list-style-type: none"> <li>• Understands and can identify tables and illustrative materials (eg artwork, images, photographs, line drawings, maps, graphs, charts, icons, infographics, video)</li> <li>• Understands conventions for displaying tables and graphical materials</li> <li>• Is aware of common image formats (JPEG, PNG, TIFF, EPS, BMP, GIF)</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP suite of courses Copyediting</li> <li>• CIEP suite of courses Proofreading</li> <li>• CIEP course Editing Digital Content</li> <li>• M Mitchell &amp; S Wightman <i>Typographic Style Handbook</i> (MacLehose Press, 2017)</li> <li>• JV Freeman, SJ Walters &amp; MJ Campbell <i>How to Display Data</i> (BMJ Books; 2008)</li> </ul>
2.1.9 Types of content	<ul style="list-style-type: none"> <li>• Understands and can identify different types of content (eg general and academic non-fiction, fiction, guides, manuals, websites, reports, public information, art, music, learned journals,</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP suite of courses Copyediting</li> <li>• CIEP suite of courses Proofreading</li> <li>• CIEP course Editing Digital Content</li> </ul>



Knowledge criteria	Editorial competency, professional skills and attitudes	Resources to support learning/CPD
	<p>magazines, blogs, textbooks, scientific, technical, medical, legal, drama, audiovisual media, interactive media)</p> <ul style="list-style-type: none"> <li>• Is aware of the practice of tailoring material to make it appropriate for different publishing markets and different audiences</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP course Web Editing</li> </ul>
2.1.10 Parts of a publication	<ul style="list-style-type: none"> <li>• Understands and can identify the conventional parts of different types of publications (eg book, journal, report) and understands their purposes and usual order or placement</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP suite of courses Copyediting</li> <li>• CIEP suite of courses Proofreading</li> <li>• CIEP fact sheet <i>Anatomy of a book</i></li> <li>• M Mitchell &amp; S Wightman <i>Typographic Style Handbook</i> (MacLehose Press, 2017)</li> </ul>
2.1.11 Different models of publishing	<ul style="list-style-type: none"> <li>• Is aware of the different types of publishing models (eg traditional publishing, businesses and other clients, self-publishing)</li> <li>• Understands the different financial models of publishing (eg traditional publisher pays, author pays, open access, hybrid models, self-publishing)</li> </ul>	ALPSP training course How Journals Work
2.1.12 Principles of accessibility	<ul style="list-style-type: none"> <li>• Understands the importance of accessibility of print and online materials for all users, including people with disabilities</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP course Plain English for Editors</li> <li>• CIEP guide <i>Editing into Plain English</i></li> <li>• Inclusive Publishing Improving the Accessibility of your Mainstream Digital Content</li> <li>• Book Industry Study Group BISG Guide to Accessible Publishing &amp; Cheat Sheets</li> <li>• Accessible Books Consortium <i>Accessibility Guidelines for Self-Publishing Authors</i>, by Dave Gunn (2016)</li> <li>• Writing with Color (writing and resources centred on racial, ethnic and religious diversity)</li> <li>• The Diversity Style Guide</li> <li>• Conscious Style Guide</li> </ul>



## 2.2 Editorial knowledge

Demonstrates an understanding of:

- grammar and usage
- spelling and punctuation
- voice and tone
- citations, references and bibliographies
- use of languages
- numeracy
- tables and illustrations
- sources of information
- indexing

Knowledge criteria	Editorial competency, professional skills and attitudes	Resources to support learning/CPD
2.2.1 Grammar, punctuation and usage	<ul style="list-style-type: none"> <li>• Understands and can apply conventions of English grammar and usual practice</li> <li>• Has adequate command of punctuation</li> <li>• Has good command of punctuation, vocabulary and other conventions for the variety of English being edited or proofread</li> <li>• Understands use of common symbols</li> <li>• Has general knowledge of common English usage as appropriate to the relevant media and audience</li> <li>• Understands that language develops and changes over time</li> <li>• Understands the difference between prescriptive and descriptive principles in decisions about usage</li> <li>• Understands appropriate usage for different audiences and arenas</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP course Getting to Grips with Grammar and Punctuation</li> <li>• CIEP suite of courses Copyediting</li> <li>• CIEP suite of courses Proofreading</li> <li>• CIEP focus paper <i>Global Englishes</i></li> <li>• CIEP focus paper To whom it may concern</li> <li>• CIEP blog Of Indian Englishes, eating heads and doing the needful, by Ayesha Chari</li> <li>• JR Kohl <i>The Global English Style Guide</i> (SAS Institute, 2008)</li> <li>• R Huddleston &amp; GK Pullam <i>A Student's Introduction to English Grammar</i> (Cambridge University Press, 2005)</li> <li>• D Crystal <i>Rediscover Grammar</i>, 2nd edn (Longman, 2004)</li> <li>• J Butterfield <i>Fowler's Dictionary of Modern English Usage</i>, 4th edn (Oxford University Press, 2015)</li> </ul>

Knowledge criteria	Editorial competency, professional skills and attitudes	Resources to support learning/CPD
2.2.2 Spelling	<ul style="list-style-type: none"> <li>• Has good command of spelling for the variety of English being edited or proofread</li> <li>• Understands the appropriate use of alternative options and flexibility</li> <li>• Can identify and knows when to use variant spellings (eg in other English-speaking countries)</li> <li>• Understands use of short forms, abbreviations and contractions</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP course Getting to Grips with Grammar and Punctuation</li> <li>• CIEP suite of courses Copyediting</li> <li>• CIEP suite of courses Proofreading</li> <li>• CIEP focus paper <i>Global Englishes</i></li> </ul>
2.2.3 Voice and tone	<ul style="list-style-type: none"> <li>• Understands reading level, register (degree of formality) and use of terminology appropriate to the type of publication and audience</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP suite of courses Copyediting</li> <li>• CIEP suite of courses Proofreading</li> <li>• CIEP course Plain English for Editors</li> <li>• CIEP fact sheet <i>Being aware of gendered language</i></li> <li>• CIEP focus paper <i>The state of gendered language</i></li> <li>• CIEP focus paper <i>Global Englishes</i></li> <li>• JR Kohl <i>The Global English Style Guide</i> (SAS Institute, 2008)</li> <li>• Writing with Color (writing and resources centred on racial, ethnic and religious diversity)</li> <li>• University of Manchester Academic Phrasebank (resource for academic writers; examples of phrases for writing organised according to the main sections of a research paper or dissertation)</li> <li>• The Diversity Style Guide</li> <li>• Conscious Style Guide</li> </ul>

Knowledge criteria	Editorial competency, professional skills and attitudes	Resources to support learning/CPD
2.2.4 Citations, references and bibliographies	<ul style="list-style-type: none"> <li>• Has ability to recognise and edit Harvard, Vancouver and short-title systems</li> <li>• Is aware of typical styles and variations (data required, ordering/punctuation of data, elision, capitalisation, use of italic and bold)</li> <li>• Knows the difference between citation (details of a source or authority) and quotation (wording taken from a source or authority)</li> <li>• Understands how to treat quotations</li> <li>• Has ability to order bibliographies, cite academic publications, online sources and manuscripts, deal with/create multiple bibliographies</li> <li>• Understands need to crosscheck for consistency</li> <li>• Understands and can handle footnotes and endnotes</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP suite of courses Copyediting</li> <li>• CIEP suite of courses Proofreading</li> <li>• CIEP course References</li> <li>• Guides to different referencing styles (New Hart's Rules, Chicago, APA, MLA etc.)</li> </ul>
2.2.5 Numeracy	<ul style="list-style-type: none"> <li>• Recognises and knows how to use metric and imperial units</li> <li>• Has ability to check arithmetic totals, calculate average/area/percentage, interpret graphs, deal with simple statistics</li> <li>• Recognises and knows how to calculate conversions</li> <li>• Recognises and knows how to use roman numerals</li> <li>• Can spot significant errors of scale</li> <li>• Understands conventions in use of numbers, dates, percentages, measurements, statistical data</li> <li>• Recognises common SI units and chemical elements</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP suite of courses Copyediting</li> <li>• CIEP suite of courses Proofreading</li> <li>• DN Baron &amp; H MacKenzie Clarke <i>Units, Symbols, and Abbreviations</i>, 6th ed. (Royal Society of Medicine Press; 2008)</li> <li>• JV Freeman, SJ Walters &amp; MJ Campbell <i>How to Display Data</i> (BMJ Books; 2008)</li> </ul>

Knowledge criteria	Editorial competency, professional skills and attitudes	Resources to support learning/CPD
2.2.6 Tables	<ul style="list-style-type: none"> <li>• Understands the difference between a table and a figure and when to use them</li> <li>• Understands how to present data in tables</li> <li>• Can identify problems with data presented in tables and resolve issues or notify the author</li> <li>• Can create and edit a table in Word</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP suite of courses Copyediting</li> <li>• CIEP suite of courses Proofreading</li> <li>• CIEP course Word for Practical Editing</li> <li>• DN Baron &amp; H MacKenzie Clarke <i>Units, Symbols, and Abbreviations</i>, 6th ed. (Royal Society of Medicine Press; 2008)</li> <li>• JV Freeman, SJ Walters &amp; MJ Campbell <i>How to Display Data</i> (BMJ Books; 2008)</li> </ul>
2.2.7 Illustrations	<ul style="list-style-type: none"> <li>• Is aware of different types of illustration (eg photographs, line drawings, graphs, charts)</li> <li>• Understands image resolution necessary for print and screen</li> <li>• Understands terminology (eg half tone, greyscale, diagram, figure, caption etc)</li> <li>• Understands numbering and placement of images</li> <li>• Knows what to check in any illustration and its caption, including correspondence between the two</li> <li>• Understands when copyright permission might be needed</li> <li>• Is able to create an illustrations list, with suitably shortened entries</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP suite of courses Copyediting</li> <li>• CIEP suite of courses Proofreading</li> <li>• CIEP course <i>Copyright for Editorial Professionals</i></li> <li>• PTC short course Copyright – How to get what you need in the digital age</li> <li>• PTC e-learning module Editing Illustrations</li> </ul>

Knowledge criteria	Editorial competency, professional skills and attitudes	Resources to support learning/CPD
2.2.8 Use of languages	<ul style="list-style-type: none"> <li>• Knows and can order the Roman alphabet</li> <li>• Recognises other characters (eg Greek, Cyrillic)</li> <li>• Recognises diacritics and accents, common non-English characters</li> <li>• Is aware of alternative transcriptions</li> <li>• Is aware of common/less common foreign-language terms/names, guillemets, further diacritics, accents, capitalisation</li> <li>• Is alert to false friends</li> </ul>	<ul style="list-style-type: none"> <li>• JR Kohl <i>The Global English Style Guide</i> (SAS Institute, 2008)</li> </ul>
2.2.9 Sources of information	<ul style="list-style-type: none"> <li>• Can find relevant information and discern provenance of sources</li> <li>• Can use online sources with discrimination (ability to judge how and when to use the internet and how far to trust the results)</li> <li>• Is aware of the content of various resources (eg dictionaries, spelling dictionaries, CIEP forums, online library catalogues such as the British Library and Jisc Library Hub Discover, atlases, thesauri)</li> <li>• Is aware of corpora and their uses</li> <li>• Can supply missing information or make informed suggestions to client</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP fact sheet <i>Reference books and resources for editors</i></li> <li>• Published style guides</li> </ul>
2.2.10 Indexing	<ul style="list-style-type: none"> <li>• Understands the structure of a standard index (entries, subentries, cross-references)</li> <li>• Understands the role of the professional indexer</li> <li>• Understands the extent to which an editorial professional should be expected to check and correct an index</li> <li>• Understands conventions for ordering index entries</li> <li>• Has ability to edit and order an author-generated index</li> </ul>	<ul style="list-style-type: none"> <li>• Society of Indexers course Training in Indexing</li> <li>• Society of Indexers online workshops (especially Indexing for Editors)</li> </ul>





## 2.3 Editorial judgement

Demonstrates an understanding of:

- judgement of sense
- judgement of voice
- clarity in writing
- author and client queries

Knowledge criteria	Editorial competency, professional skills and attitudes	Resources to support learning/CPD
2.3.1 Judgement of sense	<ul style="list-style-type: none"> <li>• Has general knowledge appropriate to the genre and subject area they are working with</li> <li>• Understands judgement of sense: does content appear correct and appropriate for context? if doubtful: flag, query or change? Is change justified and appropriate?</li> <li>• Understands vocabulary and idioms (corrects any easily confused words; if not the right word, can supply a suitable replacement)</li> <li>• Can explain/justify changes</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP suite of courses Copyediting</li> <li>• CIEP suite of courses Proofreading</li> <li>• CIEP course Plain English for Editors</li> </ul>

Knowledge criteria	Editorial competency, professional skills and attitudes	Resources to support learning/CPD
2.3.2 Judgement of voice	<ul style="list-style-type: none"> <li>• Understands and respects author's voice but can assess whether suited to the content and the target/likely audience, appropriateness for context</li> <li>• Can make changes in keeping with context</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP suite of courses Copyediting</li> <li>• CIEP suite of courses Proofreading</li> <li>• CIEP course Getting to Grips with Grammar and Punctuation</li> <li>• CIEP course Plain English for Editors</li> <li>• CIEP fact sheet <i>Being aware of gendered language</i></li> <li>• CIEP focus paper <i>The state of gendered language</i></li> <li>• Writing with Color (writing and resources centred on racial, ethnic and religious diversity)</li> <li>• The Diversity Style Guide</li> <li>• Conscious Style Guide</li> </ul>
2.3.3 Clarity in writing	<ul style="list-style-type: none"> <li>• Understands the need to avoid ambiguity</li> <li>• Understands appropriate use of language and tone</li> <li>• Understands conciseness (elimination of redundancy/repetition)</li> <li>• If space is limited or layout is fixed, is aware of the need to fit any change into the available space without causing a new problem</li> <li>• Can reword appropriately to simplify, clarify or shorten text</li> <li>• Can identify whether material is well expressed and flows logically, with the ideas and wording easy to follow</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP suite of courses Copyediting</li> <li>• CIEP suite of courses Proofreading</li> <li>• CIEP course Getting to Grips with Grammar and Punctuation</li> <li>• CIEP course Plain English for Editors</li> <li>• JR Kohl <i>The Global English Style Guide</i> (SAS Institute, 2008)</li> <li>• Conscious Style Guide</li> </ul>

Knowledge criteria	Editorial competency, professional skills and attitudes	Resources to support learning/CPD
2.3.4 Author and client queries	<ul style="list-style-type: none"> <li>• Understands judgement required for author queries (when, what and how) and how many queries are appropriate</li> <li>• Can ask relevant client queries (remit, style, problems), and to judge how many, when and how to ask</li> <li>• Can formulate clear, concise, useful questions</li> <li>• Understands when to alert client to problems of content</li> <li>• Can raise appropriate queries and deal with redundancy, omission, errors and inconsistencies, all within the limits of schedule and budget</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP suite of courses Copyediting</li> <li>• CIEP suite of courses Proofreading</li> <li>• CIEP course The Art of Querying (in development)</li> <li>• PTC e-learning module Author Queries</li> </ul>

## 2.4 Editorial practice

Demonstrates an understanding of:

- markup
- editorial standards in context
- errors, omissions and other problems
- proofreader's remit
- copyeditor's remit
- proof-editing
- editorial brief
- project style sheets
- house style
- managing an editorial project

Knowledge criteria	Editorial competency, professional skills and attitudes	Resources to support learning/CPD
2.4.1 Markup	<ul style="list-style-type: none"> <li>• Understands and can use conventional copyediting marks for use on hard copy</li> <li>• Understands and can use Word Comment tools and Track Changes for editing electronically</li> <li>• Understands and can use standard BSI 5261 proof correction marks (hard copy and via electronic PDF stamps)</li> <li>• Understands purpose of coding/tagging and can apply appropriately</li> <li>• Understands use of Word styles</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP suite of courses Copyediting</li> <li>• CIEP suite of courses Proofreading</li> <li>• CIEP course Word for Practical Editing</li> <li>• Publishing Scotland courses Introduction to/Further Copy-editing</li> <li>• Publishing Scotland courses Introduction to/Further Proofreading</li> <li>• Adobe Acrobat DC tutorials</li> </ul>
2.4.2 Editorial standards in context	<ul style="list-style-type: none"> <li>• Understands and can apply editorial standards in context</li> <li>• Can assess whether material is clear, concise, consistent, correct, coherent, complete and credible</li> <li>• Can judge appropriate level of intervention</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP suite of courses Copyediting</li> <li>• CIEP suite of courses Proofreading</li> <li>• CIEP course The Art of Querying (in development)</li> </ul>

Knowledge criteria	Editorial competency, professional skills and attitudes	Resources to support learning/CPD
2.4.3 Errors, omissions and other problems	<ul style="list-style-type: none"> <li>• Can deal with errors, omissions and other problems in the context of the project</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP suite of courses Copyediting</li> <li>• CIEP suite of courses Proofreading</li> <li>• CIEP course Plain English for Editors</li> <li>• CIEP course Getting to Grips with Grammar and Punctuation</li> <li>• CIEP course The Art of Querying (in development)</li> </ul>
2.4.4 Proofreader's remit	<ul style="list-style-type: none"> <li>• Understands the possible extent and limits of a proofreader's remit and the tasks involved in proofreading</li> <li>• Follows brief, applies editorial standards and good practice, in context and using judgement</li> <li>• Can collate proofs</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP suite of courses Proofreading</li> <li>• Publishing Scotland courses Introduction to/Further Proofreading</li> </ul>
2.4.5 Copyeditor's remit	<ul style="list-style-type: none"> <li>• Understands the possible extent and limits of a copyeditor's remit and the tasks involved in copyediting</li> <li>• Follows brief, applies editorial standards and good practice in context and using judgement</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP suite of courses Copyediting</li> <li>• CIEP fact sheet <i>Academic editing in the humanities and social sciences</i></li> <li>• CIEP fact sheet <i>Good editorial relationships</i></li> <li>• Publishing Scotland courses Introduction to/Further Copy-editing</li> </ul>
2.4.6 Proof-editing	<ul style="list-style-type: none"> <li>• Understands the nature and possible extent and limitations of proof-editing</li> <li>• Can advise the client and adjust their editorial work accordingly</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP suite of courses Copyediting</li> <li>• CIEP suite of courses Proofreading</li> </ul>
2.4.7 Editorial brief	<ul style="list-style-type: none"> <li>• Understands the typical contents of an editorial brief</li> <li>• Understands what can be expected and what could be included in a brief for a proofreader or copyeditor</li> <li>• Can discuss possible/desirable changes to the brief and remit of the editor/proofreader</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP suite of courses Copyediting</li> <li>• CIEP suite of courses Proofreading</li> <li>• CIEP fact sheet <i>Dealing with scope creep</i></li> <li>• Publishing Scotland courses Introduction to/Further Copy-editing</li> </ul>

Knowledge criteria	Editorial competency, professional skills and attitudes	Resources to support learning/CPD
2.4.8 House style	<ul style="list-style-type: none"> <li>• Is aware of what can be expected, what is usually essential, what could be included in a house style guide</li> <li>• Is aware of typical styles and variations</li> <li>• Can follow a given style and brief</li> <li>• Can create a house style</li> <li>• Can judge when it is not appropriate to apply house style</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP suite of courses Copyediting</li> <li>• CIEP suite of courses Proofreading</li> <li>• CIEP guide <i>Your House Style: Styling your words for maximum impact</i></li> <li>• PTC e-learning module Editorial Style</li> <li>• Current editions of published style guides (eg <i>Chicago Manual of Style</i>, American Psychological Association <i>Publication Manual of the American Psychological Association</i>, <i>The Economist Style Guide</i>)</li> </ul>
2.4.9 Project style sheets	<ul style="list-style-type: none"> <li>• Can create a project style sheet</li> <li>• Is aware of what can be expected, what is usually essential, what could be included in a project style sheet</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP suite of courses Copyediting</li> <li>• CIEP suite of courses Proofreading</li> <li>• CIEP guide <i>Your House Style: Styling your words for maximum impact</i></li> <li>• Current editions of published style guides (eg <i>Chicago Manual of Style</i>, American Psychological Association <i>Publication Manual of the American Psychological Association</i>, <i>The Economist Style Guide</i>)</li> </ul>
2.4.10 Managing an editorial project	<ul style="list-style-type: none"> <li>• Understands the possible extent and limits of an editorial project manager's remit</li> <li>• Understands scheduling and planning a project</li> <li>• Can adapt to changes in schedule or resources</li> <li>• Understands the need to work within a budget</li> <li>• Understands the need for good communication and briefing with all parties in a project</li> <li>• Can take on aspects of the editorial project manager's role when necessary</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP course Editorial Project Management</li> <li>• CIEP guide Editorial Project Management</li> <li>• PTC course Project Management for Publishers</li> <li>• PTC course An Introduction to Digital Project Management</li> <li>• PTC course Advanced Digital Project Management</li> </ul>

### 3 Specialist skills and knowledge

Every specialism has its own conventions and codes. Some are listed here; if you work in a particular specialism and you think that further sections could usefully be added, please contact the training director ([training@ciep.uk](mailto:training@ciep.uk)).

Details may include the following (this list is not comprehensive):

Knowledge criteria	Editorial competency, professional skills and attitudes	Resources to support learning/CPD
1 Common conventions and standards in the specialist subject	<ul style="list-style-type: none"> <li>• Has a good understanding of the subject field</li> <li>• Understands the use of style conventions</li> <li>• Understands correct use of specialist units, symbols and abbreviations</li> </ul>	•
2 Common reporting guidelines	<ul style="list-style-type: none"> <li>• Understands appropriate standards in the subject field</li> <li>• Understands common reporting guidelines (eg ...)</li> </ul>	•
3 Style guides	<ul style="list-style-type: none"> <li>• Understands and can use different specialist style guides</li> </ul>	•
4 Specialist terminology and/or notation	<ul style="list-style-type: none"> <li>• Understands and can use appropriate specialist terminology</li> </ul>	•

### 3.1 Fiction

Demonstrates an understanding of:

- liaison with the author
- assessment of the manuscript and brief
- structural editing
- line editing

Knowledge criteria	Editorial competency, professional skills and attitudes	Resources to support learning/CPD
3.1.1 Liaison with author	<ul style="list-style-type: none"> <li>• Understands the importance of being sensitive to the author's words, creations and intentions and not discounting elements of the work out of hand or imposing the editor's own viewpoint on the material</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP course Introduction to Fiction Editing</li> <li>• CIEP guide <i>Getting Started in Fiction Editing</i></li> <li>• CIEP Mentoring scheme</li> <li>• Sophie Playle courses:               <ul style="list-style-type: none"> <li>◦ Tea &amp; Commas: How to edit fiction professionally</li> <li>◦ Developmental Editing: Fiction theory</li> <li>◦ Developmental Editing in Practice</li> </ul> </li> <li>• Sophie Playle blog</li> <li>• Author-Editor Clinic The Editor's POV blog</li> <li>• Emma Darwin This Itch of Writing: The Blog</li> <li>• Louise Harnby Switching to Fiction (course)</li> <li>• Louise Harnby How to Write the Perfect Editorial Report (course)</li> <li>• Louise Harnby <i>Editing Fiction at Sentence Level</i> (2020)</li> <li>• Louise Harnby <i>Making Sense of 'Show, Don't Tell'</i> (2021)</li> <li>• Louise Harnby Fiction editing resource library</li> </ul>
3.1.2 Assessment of the manuscript and brief	<ul style="list-style-type: none"> <li>• Has ability to assess a manuscript and agree a brief</li> </ul>	
3.1.3 Structural editing	<ul style="list-style-type: none"> <li>• Understands the principles of structural editing: detailed analysis of the text, advising the author of any structural or major changes required</li> <li>• Can identify and analyse themes and plot types; author's voice and style; different points of view; dialogue; consistency of plot, timeline and setting, character, language</li> </ul>	
3.1.4 Line editing	<ul style="list-style-type: none"> <li>• Understands the principles of line editing and advising the author of any textual inconsistencies, contradictions and anomalies within the text</li> </ul>	



### 3.2 Scientific and medical publishing

Demonstrates an understanding of:

- common conventions and standards in scientific writing
- creation and layout of tables, figures and graphs
- ethics in scientific publishing
- common format and contents of a research article
- common reporting guidelines
- scientific style guides

Knowledge criteria	Editorial competency, professional skills and attitudes	Resources to support learning/CPD
3.2.1 Common conventions and standards in scientific and medical writing	<ul style="list-style-type: none"> <li>• Has a good understanding of the subject field</li> <li>• Understands the scientific method</li> <li>• Understands the use of style conventions</li> <li>• Understands and can use appropriate scientific/medical terminology</li> <li>• Understands correct use of scientific/medical units, symbols and abbreviations</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP course Medical Editing</li> <li>• CIEP Mentoring scheme</li> <li>• Council of Science Editors. <i>Scientific Style and Format</i>, 8th edn (University of Chicago Press, 2014)</li> <li>• ER Scheinerman <i>Mathematical Notation: A Guide for Engineers and Scientists</i> (Amazon, 2011)</li> <li>• Scientific Writing in Health &amp; Medicine (SWIHM) website</li> <li>• EQUATOR Network</li> <li>• SWIHM Health research reporting guidelines</li> <li>• DN Baron &amp; H McKenzie Clark <i>Units, Symbols and Abbreviations: A Guide for Authors and Editors</i>, 6th edn (Royal Society of Medicine, 2008)</li> <li>• American Medical Association. <i>AMA Manual of Style: A guide for authors and editors</i> (current edition)</li> </ul>

Knowledge criteria	Editorial competency, professional skills and attitudes	Resources to support learning/CPD
3.2.2 Creation and layout of tables, figures and graphs	<ul style="list-style-type: none"> <li>• Understands use of common types of graphs and charts (eg Kaplan–Meier curves, stem and leaf plots, bar charts, line graphs, box–whisker plots, forest plots, bubble charts)</li> <li>• Is aware of the need to avoid misrepresentation of data</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP course Medical Editing</li> <li>• JV Freeman, SJ Walters &amp; MJ Campbell <i>How to Display Data</i> (BMJ Books, 2008)</li> <li>• Association of the British Pharmaceutical Industry code of practice guidelines on figures</li> </ul>
3.2.3 Ethics in scientific and medical publishing	<ul style="list-style-type: none"> <li>• Understands the need for ethical approval of studies (ethics committees, standards such as Declaration of Helsinki; Guide for the Care and Use of Laboratory Animals)</li> <li>• Understands ICJME recommendations on roles and responsibilities</li> <li>• Understands conflict of interest statements</li> <li>• Understands principles of original work and plagiarism</li> <li>• Understands and applies relevant professional guidelines (eg Good Publication Practice guidelines, ABPI Code of Practice, ICJME recommendations on publishing and editorial issues, ICJME recommendations on manuscript preparation and submission)</li> </ul>	<ul style="list-style-type: none"> <li>• ICJME website</li> <li>• National Research Council, Committee for the Update of the Guide for the Care and Use of Laboratory Animals. <i>Guide for the Care and Use of Laboratory Animals</i>, 8th edn (National Academies Press, 2011)</li> <li>• Committee on Publication Ethics website</li> <li>• Council of Science Editors Editorial Policy Committee. <i>CSE's White Paper on Promoting Integrity in Scientific Journal Publications</i> (CSE, 2018)</li> </ul>
3.2.4 Common format and contents of a research article	<ul style="list-style-type: none"> <li>• Understands the standard components of a research article and appropriate terminology</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP course Medical Editing</li> </ul>
3.2.5 Common reporting guidelines	<ul style="list-style-type: none"> <li>• Understands common reporting guidelines (eg PRISMA, CONSORT, STROBE, CARE)</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP course Medical Editing</li> </ul>

Knowledge criteria	Editorial competency, professional skills and attitudes	Resources to support learning/CPD
3.2.6 Scientific and medical style guides	<ul style="list-style-type: none"> <li>Understands and can use different scientific/medical style guides</li> </ul>	<ul style="list-style-type: none"> <li>CIEP course Medical Editing</li> <li>American Medical Association. <i>AMA Manual of Style: A Guide for Authors and Editors</i> (current edition)</li> <li>American Psychological Association. <i>Publication Manual</i> (current edition)</li> <li>Council of Science Editors. <i>Scientific Style and Format</i> (current edition)</li> </ul>

### 3.3 Technical communications

Demonstrates an understanding of:

- common conventions and standards in technical communications
- clarity in technical communications
- structural considerations in technical communications

Knowledge criteria	Editorial competency, professional skills and attitudes	Resources to support learning/CPD
3.3.1 Common conventions and standards in technical communications	<ul style="list-style-type: none"> <li>• Understands how to edit for a global audience</li> <li>• Understands the challenges for translators</li> <li>• Understands concept of Simplified Technical English (STE)</li> </ul>	<ul style="list-style-type: none"> <li>• CIEP course Plain English for Editors</li> <li>• Simplified Technical English Maintenance Group ASD Simplified Technical English Specification, ASD-STE100.</li> </ul>
3.3.2 Clarity in technical communications	<ul style="list-style-type: none"> <li>• Has ability to convey technical instructions with clarity</li> <li>• Has ability to make technical text as accessible as possible to intended users</li> <li>• Has ability to edit to promote greater visual communication where appropriate</li> </ul>	<ul style="list-style-type: none"> <li>• S Crabbe, ed. <i>Current Practices And Trends In Technical And Professional Communication</i>. (Institute of Scientific and Technical Communicators, 2017).</li> <li>• R Kapp <i>The Presentation of Technical Information</i>. (Institute of Scientific and Technical Communicators, 2018).</li> </ul>
3.3.3 Structural considerations in technical communications	<ul style="list-style-type: none"> <li>• Understands conventional structure of user manuals</li> <li>• Understands document types and technical document standards (eg API [application program interface] documentation, DITA [Darwin Information Typing Architecture] and XML)</li> </ul>	<ul style="list-style-type: none"> <li>• K Vasudevan What is API Documentation, and Why It Matters? [blog post] 6 June 2017</li> <li>• JR Kohl <i>The Global English Style Guide</i> (SAS Institute, 2008)</li> </ul>

### 3.4 Legal publishing

Demonstrates an understanding of:

- common conventions and standards in legal writing
- legal style guides

Knowledge criteria	Editorial competency, professional skills and attitudes	Resources to support learning/CPD
<p>3.4.1 Common conventions and standards in legal writing</p>	<ul style="list-style-type: none"> <li>• Has a basic understanding of the structure and functioning of the domestic legal and legislative system and any other legal system encountered frequently in work</li> <li>• Has an appreciation of the differences between the common law and civil law systems, and statute law and case law</li> <li>• Has a detailed knowledge of structure of case and legislation citations for the domestic legal system and any legal system encountered frequently in work, and also how to cite international treaties</li> <li>• Understands the concept of neutral citation and use of round and square brackets in English and Welsh law case citations</li> <li>• Understands that common legal styles require case names to be in italic type and legislation in roman type</li> <li>• Understands common legal terminology; where this has been revised, understands the need to use the appropriate term for the date of the case</li> <li>• Understands which phrases in Latin must be in italic and which in roman</li> <li>• Understands the concept of tables of cases and legislation and Can order entries appropriately</li> </ul>	<p>Resources for the UK</p> <ul style="list-style-type: none"> <li>• UK legislation</li> <li>• Hansard</li> <li>• BAILII (British and Irish Legal Information Institute) case transcriptions</li> <li>• Lisa Webley, <i>Legal Writing</i>, 4th edn, Routledge, 2016 (aimed at law students, but helpful for knowledge of the conventions)</li> </ul> <p>England and Wales</p> <ul style="list-style-type: none"> <li>• Courts and Tribunals Judiciary: Structure of the courts and tribunal system</li> <li>• The Law Society</li> </ul> <p>Other jurisdictions</p> <ul style="list-style-type: none"> <li>• EUR-Lex Access to European Union Law</li> <li>• UN Treaty Collection</li> <li>• US Supreme Court</li> </ul>

Knowledge criteria	Editorial competency, professional skills and attitudes	Resources to support learning/CPD
3.4.2 Legal style guides	<ul style="list-style-type: none"><li>• Has good working knowledge of the legal style guides used by the legal systems and clients they work with frequently</li><li>• Is aware of other styles and is prepared to research them if needed</li></ul>	<ul style="list-style-type: none"><li>• OSCOLA (Oxford University Standard for Citation of Legal Authorities)</li></ul>

### 3.5 Music publishing

Demonstrates an understanding of:

- common conventions and standards in music publishing
- role of the editor and proofreader in music publishing
- setting music
- music books and journals
- educational music books
- musical notation

Knowledge criteria	Editorial competency, professional skills and attitudes	Training support
3.5.1 Common conventions and standards in music publishing	<ul style="list-style-type: none"> <li>• Understands different forms of music publication (eg instrumental and vocal scores, educational music books, scholarly music books and journals, magazines, programme notes)</li> </ul>	
3.5.2 Role of the editor and proofreader in music publishing	<ul style="list-style-type: none"> <li>• Understands role of the editor and proofreader in music publishing</li> </ul>	
3.5.3 Setting music	<ul style="list-style-type: none"> <li>• Understands difference between setting music for performance and setting music in the context of a book or other publication</li> <li>• Is aware of music typesetting programs (eg Sibelius, Finale, Score, Dorico)</li> <li>• Understands marking up a handwritten music manuscript for typesetting</li> </ul>	
3.5.4 Music books and journals	<ul style="list-style-type: none"> <li>• Understands role of examples of music in scholarly works</li> <li>• Has ability to identify problematic typesetting of music examples in proofs</li> <li>• Has ability to check examples for errors or knows who has responsibility to check</li> </ul>	

Knowledge criteria	Editorial competency, professional skills and attitudes	Training support
3.5.5 Educational/instructional music books	<ul style="list-style-type: none"> <li>• Has ability to judge appropriate level of content</li> <li>• Can identify problems in question construction in course books</li> <li>• Understands the need to check factual accuracy of answers in course books</li> <li>• Has ability to supply clear instructions to designer</li> </ul>	
3.5.6 Musical notation	<ul style="list-style-type: none"> <li>• Understands and has ability to use basic musical notation (eg notes, rests, accidentals, expression marks, clefs, time and key signatures, bar lines, staves, ties, beaming, guitar chords)</li> <li>• Has ability to identify errors in musical material (eg poor alignment, incorrect accidentals, misplaced note stems, incorrect beaming)</li> <li>• Understands correct word placement in vocal scores</li> <li>• Is aware of and understands more unusual/specialised notations (eg plainchant, graphics to show pitch and texture, guitar TAB scores)</li> </ul>	