Proofreading versus editing texts distinguished

John Linnegar

A copy editor is 'someone who decides where the commas go'.
A proofreader is 'someone who decides where the commas should have gone' (Sullivan).

In conventional book and journal publishing, an author's text proceeds through a standard process, as follows:

1   An **author** writes a book or an article.

2   The publisher engages a **copy editor** to fix or improve the author's raw words, with firmness and sensitivity, to the extent of adding to the value of those words and the book and also to the reputation of its author and publisher.

3   Once the copy editor and the author have ironed out all the problems in the manuscript and polished it as best they can, the manuscript goes for **design and layout** so that it takes on the appearance of the pages of the printed book for the first time.

4   During the layout or typesetting process, errors may be introduced – formatting, layout, spacing, etc – and someone has to detect those errors: this is the task of the **reader of the typesetter's proofs**. In the process of reading the proofs from beginning to end with an eagle eye, the proofreader may detect errors that both the author and the editor missed, and correct them. We say that roughly 5% of all proof corrections may involve copy-editing (doing the editor's work); the remainder should arise from the layout, formatting and typesetting.

   A publisher that values their and their author's reputation will put the book through about three stages of proofreading in order to iron out every single last error.

These steps highlight the *order* in which the two tasks occur. Indeed, one of the biggest differences between copy-editing and proofreading is *when* each occurs in the editorial process. Copy-editing occurs *before* book layout to ensure that a book designer is laying out the cleanest manuscript possible. Proofreading occurs *after* book or journal layout is complete. Proofreading is a final check before a book goes to the printer to ensure there are no formatting errors and that all the changes requested in a copy-edit have been implemented. Also, whereas a copy-edit is performed on a manuscript (a single document), a proofread is usually a comparison between a copy-edited manuscript and the laid-out text. The two are read side by side, word by word, to make sure they match. A proofreader also looks for any final typos or grammar or other mistakes a copy editor may have missed.

The way in which proofreading fits into this conventional and still adhered-to process is verified by a number of leading authors on the subject of copy-editing, proofreading and publishing:

> Davies & Balkwill (2011: 171–172): People from outside publishing sometimes confuse the role of the copy-editor with that of the proofreader …. It is true that the skill involved in both needs a meticulous eye for detail, but someone correcting proofs is making a strict comparison between an approved original (the edited manuscript) and the typesetter's rendering of that original, while the copyeditor might be allowed more room for intervention and initiative. The copy-editor ultimately adds value to the author's words through their sensitive but firm intervention in them.

> Einsohn & Schwartz (2019: 13–14, 474): *Copyeditors are not proofreaders.* Copyediting and proofreading are two different functions. Copyeditors work on the author's manuscript and are concerned with imposing mechanical consistency; correlating parts; correcting infelicities of grammar, usage, and diction; querying internal inconsistencies and structural or organizational problems; flagging content requiring permission; and tagging or styling elements. Proofreaders, in contrast, are charged with correcting errors introduced during typesetting, formatting, or file conversion of the final document; with emending deficient page layout; and with identifying any serious errors that were not caught during copyediting.
>
> Burton (in Mackenzie 2005: 74): Edit the manuscript, not the proofs.
>
> Mossop (2014: 33): After a manuscript has been edited, it goes … for page design and typesetting …. The outcome of this process then has to be compared with the original Word document in order to catch any remaining errors, or errors introduced during design and typesetting. This task, known as proofreading, may be assigned to … a specialized proofreader.
>
> Van der Poel, Carstens & Linnegar (2012: 278): Every time a typesetter or designer intervenes in or manipulates the text, someone has to check that (*a*) any errors the editor and author allowed to slip through and (*b*) any further errors the typesetter or designer may have introduced are detected and corrected. This process of reading and marking up corrections on proofs is called 'proofreading' or 'proof correction'.

What emerges from this brief outline of the process of producing books (and journals and magazines) is the undoubtedly distinct tasks of the copy editor and the proofreader and the timing of their respective interventions. It is always the copy editor who intervenes in the author's raw text in great depth and detail to ensure that it makes the best possible impression. As a result, a copy editor will typically take at least twice as long as a proofreader to check and improve the same text. In the process, the copy editor might liaise directly with the author frequently to resolve questions along the way.

Following on from this, because of their different levels of engagement with an author's text, the copy editor and the proofreader are entitled to charge different fees for their work: either per page or per word. In either case, a copy-edit is likely to cost about double the amount of a proofread.

Editing, not proofreading, theses and dissertations

Now, because theses and dissertations are raw texts that will not undergo typesetting to become the pages of a book, it stands to reason that the service the writers of such examinable texts should be engaging to polish their thesis manuscript can only be copy-editing. To ask a service provider to perform a proofread on such a document is therefore disingenuous: it is simply not going to do the text justice and therefore it is an impossible ask.

Indeed, the student usually has to follow the prescriptions of their university or faculty when laying out the pages of their thesis themself (eg 12 pt Arial or Times New Roman, 1,5 line spacing and specified margin widths, treatment of the different heading levels and tables according to a template). In most instances, the copy editor is not permitted to engage with the layout or formatting at all, otherwise the document risks being no longer the student's own original work.

Levels and related costs of editing theses and dissertations

Regarding the copy-editing, an eternal burning question is 'How much will it cost to have my thesis or dissertation edited?'

The answer will always be based on the state of the document, that is, the writer's ability to express themselves clearly and succinctly and their command of the grammar, spelling and other conventions of the language of the text. The student's thinking as it is evinced through their writing must ultimately impress their examiners, which is where the copy editor comes in. Rendering the document examination-ready will usually take the intervention of an expert wordsmith who is able to polish the document within

the constraints of retaining the author's text, ideas and voice through their own original words and reflecting their own original thinking. As you will see below, for this reason, their intervention has to be little more than a 'light' or a 'medium' edit.

But when, as so often is the case nowadays, the author of the thesis or dissertation is forced to write the chapters in a language that is not their mother tongue (usually in English) and over which they do not have a good command, then it is usually up to the copy editor to assess the text and, on the basis of their assessment, to determine what the level of their intervention will have to be – and the corresponding cost.

This is where the editor (and the author) should be aware of the *different levels of copy-editing* and to charge according to the required level. There are three main levels of intervention: light, medium and heavy. Besides these levels, the copy editor of a thesis also has two further factors to consider: product or process. These also refer to the editor's level of engagement with the text and the extent to which they collaborate with the student-author to ensure that the text remains their own original words.

Product versus process approach to copy-editing

In the *product* approach, effectively, the copy editor goes ahead and makes as many corrections as they consider necessary (also termed 'fixing'): grammar, spelling, capitalisation, numbers, abbreviations, lists, consistency, internationally accepted conventions, and so on. They may insert the odd query for the student author in a Comment where they are unable – or not permitted – to make a correction (also termed 'flagging'). Ultimately, though, they present the student with the final product of their editing, and that's usually that. The student must attend to the rest.

In contrast, in the *process* approach, the editor and the author collaborate much more closely in the process of copy-editing and improving the text (a combination of fixing and flagging usually): many more questions are asked and once a correction has been explained at first occurrence, the writer is encouraged to correct all similar occurrences. In other words, this is a kind of mentoring-coaching experience (akin to what the ideal supervisor-student relationship should be) in which the student becomes empowered during the process to take greater charge of their thesis.

As to the levels of editing, some explanation is necessary, also because each level has an associated cost attached to it. Let's say that light editing could be quoted at 18–22c per word, then a medium edit could be something like 22-26c per word and a heavy edit 26–30c per word. For a PhD that could range between 80 000 and 150 000 words, the variance in the total cost of the copy-editing can be quite substantial. Charging per page of the thesis or dissertation could lead to similar variances, based on the level of copy-editing required. Whatever the basis of charging, the copy editor must at least have had sight of a sample of the thesis in its final state as signed off by the supervisor in order to gauge the required level of intervention.

In some arrangements between students and copy editor, there may be a two-step process to the copy-editing: a first round, then presentation to the student for them to check the editing and make additions and amendments of their own; and then a second round, when the copy editor edits all the student's additions or corrections, because these may contain new errors that require correction. For this second step, the copy editor will be entitled to quote and bill the student separately (and this provision should be included in their quotation or the Ts&Cs of their service). This second-round fee could be based on an hourly rate because it will not involve a close rereading of every word in the document, only of those the student has added.

Light copy-editing, according to Einsohn & Schwartz (2019) and Mackenzie (2011), entails the following a limited set of corrections:

Mechanical editing: Ensure consistency in all mechanical matters – punctuation, spelling, abbreviations, numbers, abbreviations, lists, reference citations – to ensure that they are treated

consistently (ise vs ize, eg vs e.g., "double quotation marks" vs 'singles', Aids vs AIDS, five vs 5, coordinate vs co-ordinate).

This type of editing applies across all three levels. It is the extent of the language and content copy-editing that differs at each level.

Language editing: Correct all indisputable errors of grammar, syntax and usage, but ignore anything that is not an outright error; point out paragraphs that are far too wordy or convoluted, but do not revise them; ignore minor patches of wordiness, imprecise wording, and jargon; ask the author for clarification of terms likely to be new to readers.

Content editing: Query factual inaccuracies and any statements that seem incorrect; delete clear and unwarranted repetition of the same text.

Medium copy-editing, according to the authors cited above, entails the following limited set of corrections.

Language editing: Correct all errors of grammar, syntax and usage; point out or revise any substandard word usage, phrases or sentences; point out any patches that seem wordy or convoluted, and supply suggested revisions; ask for or supply definitions of terms likely to be new to readers.

Content editing: Query any facts that seem incorrect. Use standard online and printed references to verify content; query faulty organisation and gaps in logic.

Clearly, a light to medium copy-edit is the most suitable when editing theses because of the critical need to retain the author's own original words and thinking – it is, after all, they who are to be examined and awarded the degree, not the copy editor. Copy editors of theses must never intervene at the level of structural editing: at best, they may only raise queries to the student to flag problems or suggestions about restructuring paragraphs or sentences or converting in-paragraph lists to vertical lists, and so on. Then it's up to the student to make good or not.

Heavy copy-editing, according to these same authors, entails the following limited set of corrections.

Language editing: Correct all errors and infelicities of grammar, syntax and usage. Rewrite any substandard word usage, phrases or sentences; rewrite any patches that are wordy or convoluted; ask for or supply definitions of terms likely to be new to readers.

Content editing: Verify and revise any facts that are incorrect; query or fix faulty organisation and gaps in logic.

What should be apparent from these different levels of editing is how as one moves from light to medium to heavy the degree of intervention and correction increases with respect to the language and content editing (the level of mechanical editing remains the same). Commensurate with each level will be an appropriate fee. Based on experience of editing a wide range of theses from around the world, typically, theses require a light–medium or a medium edit at most – heavy editing is not permitted in the case of examinable academic texts.

Choosing a competent copy editor; some do's and don'ts

There are some definite no-nos to take into account when deciding about a suitable copy editor for your thesis or dissertation.

- Do not ask a family member or a friend, unless they are a highly experienced copy editor of academic texts and you are prepared to pay them a fair rate for their intervention.
- Do not use a colleague, even an academic colleague, if they are not a highly experienced copy editor of academic texts.

- Do not expect a professional copy-editing job to be completed over a weekend or even within a week – a document of around 70 000 words divided into, say, 5–10 chapters usually requires several weeks or a month or more to do proper justice to. Copy-editing must therefore be properly scheduled during the period leading up to the submission date.
- If at all possible, ensure that you hand over the complete document for editing: avoid handing your copy editor chapters piecemeal as you complete them or your supervisor completes their review of them (or several iterations of the same chapter while the editing is underway). Doing so will inevitably lead to a less perfect end-product, because copy editors work best when they have the whole job to hand and can gain a macro view of what needs to be done – especially in detecting inconsistencies that have to have a veneer of consistency applied to them.
- While trying to obtain two or three quotations for the copy-editing is a sound practice, do not automatically opt for the lower or lowest quotation – tempting as that may be. Always check experience against the fee and err on the side of experience and expertise (which could require asking for a list of the service provider's recent copy-editing assignments or a testimonial from a satisfied client or two). Be aware that opting for the cheapest price for the job might just land you in hot water because the copy-edited document could prove to be badly edited. If, for instance, a copy editor has quoted you around 10c per word or less, be very cautious about their capabilities or service offering: you could live to regret that decision, especially if you then have to pay a second editor to make good with your submission deadline looming and your budget having been depleted!

So what is recommended?

Preferably use an experienced professional editor who is a member of the Professional Editors' Guild (PEG). Either send a general work request via the Guild's website or check out the members listed in the members' directory on the website. That way, you can also locate the best match for your needs.

PEG members now have the option of taking an annual Accreditation Test that is benchmarked against international best practice. Those who pass it earn the title Accredited Text Editor (English) and they should really be first on your list of potential service providers because they have really proven their worth. Having this status doesn't necessarily mean that you'll pay more for their services; you'll just get a better-quality copy-edit first time and on time.

Always provide the potential copy editors with a sample of your thesis (say, a chapter or two) for them to assess and to indicate, first, the level of copy-editing envisaged and, secondly, their fee. Some may even send back an edited section showing their tracked changes in the Word document so that you can see for yourself what that 'light–medium' or 'medium' edit really entails.

It stands to reason that the copy editor you choose should be a mother-tongue speaker of the language of your thesis. Preferably avoid those whose first language does not coincide with the language of your document, because there's a strong chance that the quality of the final product will not be of the highest linguistic standard. In some instances, your correct usage may even be rendered incorrect or unidiomatic.

It also stands to reason that you should give preference to copy editors who either specialise in your field or discipline, or at least have some knowledge of it so that they have a better understanding of the terminology or jargon, the issues and the environment or the setting of the research.

When a service provider asks you for a deposit upon commencement of the copy-editing, it is usually a strong indication of both their and your commitment to undertaking the work. And it helps towards forging a collaborative, trusting and safe working relationship.

It is also extremely rare nowadays that a student and their copy editor will meet face to face: most communication about the work in hand will be by email, although currently a WhatsApp message or call or

a Zoom-type meeting could be arranged to make communicating about certain issues speedier and more efficient.

Having read this document, you should be a lot wiser about the journey that you and your thesis or dissertation will be undertaking as you strive towards submitting the most perfect rendition of that life-changing document. Just remember, though, that the journey has to be one of copy-editing and not proofreading if you're at all serious about achieving academic excellence.

If as a copy editor or proofreader of texts for publication you are reading this article, you (and your clients) should be absolutely clear about which function has to be performed when. You also have a great deal more latitude when judging which level of editing is required for a particular text: whether a light (competent author), medium (less competent author) or heavy intervention (novice or struggling author) is needed to render it publishable. And if your author's writing ability is really suspect, affecting not only the mechanical but also the language and the content aspects (and even the structural), then you should know that a developmental edit may well be necessary. As the name implies, your role as editor here would be to guide, lead by example and develop the novice or struggling author's writing skills – quite a different, and challenging, ball game.

References

Gill Davies & Richard Balkwill 2011. *The professionals' guide to publishing: A practical introduction to working in the publishing industry* (KoganPage)

Amy Einsohn & Marilyn Schwartz 2019. *The copyeditor's handbook: A guide for book publishing and corporate communications* 4th ed (University of California Press)

Janet Mackenzie 2011. *The editor's companion* (Macmillan)

Brian Mossop 2014. *Revising and editing for translators* (Routledge)

Carol Fisher Saller 2009. *The subversive copy editor* (University of Chicago Press)

Kris Van de Poel, WAM Carstens & John Linnegar 2012. *Text editing: A handbook for students and practitioners* (University Press Antwerp)