Editing Checklist
More resources: http://www.lafollette.wisc.edu/research-public-service/publications/editorial-resources

Organization

_____ Headings' type styles convey the report's organization. Heading 1 equates to Roman numerals I, II, and III in a classic outline. Heading II equates to A, B, and C, the subsections of each section. Use the built-in style sheets in Word and above all be consistent. Avoid using underline for emphasis.

_____ Use the table of contents and list(s) of tables and figures to ensure capitalization is consistent and that Word's style sheets are applied consistently throughout document.

_____ Always have at least one sentence of text between headings. This text can foreshadow what each section or subsection does.

_____ If the report has appendices, make sure the body of the paper refers to each appendix. These references must in the same order in which the appendices appear in the paper: Appendix A is the first the report mentions, etc.

_____ The body of the report should refer to all the tables as Table 1, Table 2, Table 3, etc. The tables and references should be in order. Tables in the appendices should be numbered so they correlate to the appropriate appendix letter: A1, A2, B1, B2, etc.

_____ Every figure and table should have a source and a title that are typed into the Word document to facilitate automatic numbering. All words should be spelled out.

_____ Every axis in every figure should have a label. All words should be spelled out. Figures should function as stand-alone pictures. Capitalization should be consistent.

_____ The body of the report should refer to all the figures as Figure 1, Figure 2, Figure 3, etc. The figures and references should be in order. Figures in the appendices should be numbered so they correlate to the appropriate appendix letter: A1, A2, B1, B2, etc.

_____ All table column headers should be spelled out. Be consistent in capitalization and do not use all caps. Any explanatory notes should be sentences under the table title or put under the source as part of the table, *not in a footnote* at the bottom of the report page. Location depends on importance of information. Use lower-case letters in superscript ([a]).

Accuracy, Clarity and Consistency

_____ Be sure the client name is correct and consistent.

_____ Define terms. Especially if the report is making recommendations to improve a system that is inefficient and uses different terms throughout the system's processes, define the terms the report is using and then be consistent in their use.

_____ Do the math. If a table totals figures, make sure they add up.

_____ Make sure all proper nouns are spelled consistently.

_____ Search for the word pubic and eliminate it (probably).

_____ Give specific dates instead of saying, for example, "recently," "last year" or "in the past decade."

_____ DO NOT USE ALL CAPS. THEY ARE HARD TO READ.

_____ Do not abbreviate something that is used five times or less, and try to only use abbreviations common to everyday language. Spell out on first reference. Avoid making up abbreviations for entities that are not already proper nouns. Avoid using abbreviations when presenting report to people outside your agency to avoid appearance of a coded language that inadvertently excludes them or makes them feel ignorant. Don't define an abbreviation and then not use it within the next two pages. Wait to define it until it is to be used frequently and more than twice. Do not include an abbreviations list unless the report follows the above criteria AND uses more than 10 uncommon abbreviations more than five times each.

Tighten the prose: Use the find function in Word to locate these words and phrases in **bold** and then improve the writing:

_____ **current(ly), present(ly), past** and **future** can almost always be deleted as the verb tense conveys the time element

_____ **there**: Recast sentences and phrases starting with "there are," "there were," etc. so they start with concrete nouns: *There are seven dogs barking* becomes *Seven dogs bark.*

_____ **this**: make sure a concrete noun follows:
This is a good idea becomes *This proposal is a good idea.*

_____ **responsible for, intended to, goal of,** and **designed to**: If something actually occurs and report does not mean to hedge, these phrases can often be deleted:

The board is responsible for approving the budget becomes
The board approves the budget.

The increase in cost is intended to reduce the number of commuters becomes
The increase in cost would reduce the number of commuters.

The goal of the program is to increase homeownership becomes
The program will increase homeownership.

The program is designed to increase homeownership becomes
The program increases homeownership.

_____ **in order** can almost always be deleted ~~in order~~ to save space.

_____ **and also** is redundant, as is **In addition ... also.**

_____ Search first for **was,** then **were,** then **by,** to eliminate passive voice.
Start each sentence or phrase with the noun taking the action:
Tuition was raised by the regents becomes *The regents raised tuition.*

_____ **unique** should be deleted. Instead use concrete language to illustrate how program is unique: The program is unique becomes The program is the only one in the state that has mentors continue working with the teens after they graduate from high school and start jobs or college. Show, don't tell.

_____ **is** and **are**. Find these so verbs can be strengthened and language tightened: *is providing* becomes *provides* and *are offering* becomes *offers*

_____ **impacted** is never a verb unless "wedged" is meant. Substitute affected.

_____ **negatively affect** should be *harm.*

_____ **unfortunately, fortunately, only**. Delete these words as they convey opinion and make prose flabby.

_____ **either** usually can be deleted if sentence uses "or": I'll have ~~either~~ bratwurst or tofu.

Simple Style Rules to Follow for Numbers

_____ Only use numerals after the decimal point if the fractions are essential to the meaning of the text, table or figure. Be consistent in the number of numerals used after the decimal point, and do not use more than two numerals after the decimal point. Reading "The increase of 12 percent" is MUCH easier than reading "The increase of 11.58 percent." In addition, use of a whole number makes starting a sentence much easier.

_____ Be consistent in use of percent vs. %.

_____ If a percentage is less than 1, use a zero before the decimal: 0.3 percent or 0.05 percent.

_____ "percentage" is the noun.

_____ Be consistent throughout the report in whether numbers are words or figures. Preferred rule is 10 and greater are figures and zero to nine are words.

_____ For American currency use: $5, $6.89, $6 million, $5.7 billion, 3 cents. Do not use $.03.

_____ For page numbers, use lower-case Roman numerals iii, iv, etc. for front matter – the list of tables, acknowledgments, executive summary, etc. For the body of the report, use Arabic numerals, 1, 2, 3, etc.

Reference List[1]

_____ A report should have a list of works cited, in addition to citations.

_____ Make sure all the references present information in same order and are complete.

_____ Make sure all references are capitalized, italicized and punctuated consistently.

_____ Make sure all references from the internet are complete: author (if one), publishing agency, complete date document was retrieved. Be sure punctuation and wording are consistent.

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[1] A reference list can also be called a works cited list. Both include just the materials cited in the report. A bibliography is more extensive; it includes all materials used in the research.

_____ If using endnotes or footnotes, the numbers are 1, 2, 3.[2]

Citations

_____ Citations (parenthetical or foot/endnotes) must be complete, and consistent in capitalization and punctuation. To follow Chicago, do not use a comma or &.

_____ Each author's name must be consistent (and correct) throughout report.

Harmonized Citations and Reference List

_____ Crosscheck every citation (or foot/endnote) against the works cited list to make sure every citation is listed in the references and every item in the works cited list is actually cited.

_____ Make sure each citation-reference pair doesn't contradict each other (author spelled two ways, for example).

Format of Report: The writer needs to ask the client and project manager what the end product will look like and how much time is needed for editing, production and distribution

For reports to be printed and <u>bound</u>

_____ Center the page numbers throughout the report.

_____ Set the left and right margins at 1.5 inches throughout the report.

_____ Set the top and bottom margins 1 inch throughout the report. On landscaped (horizontal) pages, the top and bottom margins MUST be 1.5 inches. Left and right can then be 1 inch.

For reports to be distributed electronically OR as printed and <u>bound</u> copies

_____ Make sure the cover page includes title, authors, client name, date, authors' affiliation (La Follette School of Public Affairs)? School logo available at http://www.lafollette.wisc.edu/formedia.html#logos

_____ Set body copy in 12-point type and align it left (not justified). For reports to be read on paper, use a serif font such as Cambria, Times New Roman or Garamond. Serif type is easier to read.

_____ Ensure the sides of the tables and figures fit INSIDE the margins. Note that Word's default places left side of tables with borders outside the left margin, so centering table on page is easiest.

_____ Be consistent with the fonts used in tables and figures. Data should be in 10- to 12-point type, depending on the design and can be in a sans serif font like Calibri, Arial or Helvetica (a narrow version is often perfect for tables and figures). Be sure figures and tables can be read in black and white, in case readers do not have color printers.

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[2] This paragraph is a footnote. An endnote looks just like it but is placed with all the other endnotes at the end of the report.