

Checklist for Writer/Editor Collaborations

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This checklist provides a set of notes for a writer and editor to consider and agree upon when preparing for and launching a significant publication project, including print or digital book manuscripts.

If you're the writer:

- Review this checklist to understand the issues to discuss with your editor.
- Use the checklist to discuss scope and focus with your editor

If you're the editor:

- Use the checklist to clarify expectations between you and the writer.
- Revise the checklist to specify the scope and emphasis you and the writer have agreed upon.

Of course, this isn't a comprehensive list, but it should help you get started in a discussions where the two of you have different skills and different needs in collaborating on a manuscript.

1. Specify the level and type of editorial guidance requested

Here are the rough categories of kinds of editing, from early writing stages through a publication-ready manuscript:

Developmental editing:

Editor provides detailed help to define the structure and key elements of the book, typically in in early draft stages. A developmental editor typically charges hourly fees similar to what a professional writer charges.

For fiction writers working on a first book, this kind of edit can be tackled in a critique group or other informal consultation.

Substantive editing:

Editor supports rewrite or structural fixes in a complete or nearly complete MS.

In some cases, a publishing house might offer a contract for a manuscript but require a substantive edit—for example, to cut a 270K-word manuscript to 150K words.

Not all editors have substantive editing skills. When hiring this kind of editorial support, the writer has to ask for it specifically, with these considerations:

— This level of editing can be expensive and require more than one iteration.

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— The editor’s portfolio and references should reveal a “fit” with the type of MS.

— The writer might feel challenged or overwhelmed by these kinds of edits.

See my post, [Is that Blood on My Manuscript? Or Are You Just Happy to Ream Me?](#)

Copyediting:

Editor verifies and corrects MS details, grammar, and mechanics.

This is what many people expect “editing” entails. This should include:

A. Diction and usage – all content types

- “Correct grammar”—as appropriate for the type of book.
 - Consistent diction.
For fiction: differentiate diction for the narrative viewpoint and for each character in dialog.
 - Word choice—suggestions based on context and tone.
 - Rhythm and shape of sentences—highlighting your pet phrases, wordiness, flabby verbs.
 - Clarity—when a reader might misread an otherwise grammatical sentence.

Tip: The writer can save time for the editor by providing a [style sheet and usage guide](#).

B. In fiction: Continuity and character development

- Events occur and are known to characters in relation to calendar and clock time.
- Characters’ ability to know details from any scene where they aren’t present.
- Logic and sequence of physical action.
- Does each character behave in each scene in ways that are true to that character?
- Does the emotional or psychological development of the character make logical sense over the course of the story?

Production edit:

Editor prepares manuscript for print production:

- Insert front and end matter.
- Set headers and footers, including page numbers.
- Insert cross references.
- Complete hyphenation and justification.

Not all editors have experience with production edit issues and mechanisms.

Proofreading:

Editor reads for mechanical and other text errors:

- Typos and other text errors.

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- Validate cross references.
- Verification of front matter, back matter, page numbers, chapter heads, typography, and other book-design elements.

Typically, editors offer proofreading at a lower hourly rate than for copyediting. The writer might choose to use the same editor for copyediting and proofreading or might choose a different reader.

Note: The writer must also read the final manuscript for all of these kinds of errors. However, even a professional with deep copyediting experience needs another editor. Your eyes will deceive you into seeing what you believe is on the page.

2. Launch the Writer/Editor engagement

Ready to determine whether an individual is the right editor for a specific manuscript?

Step 1:

Check each other out!

For the writer, identify that the candidate editor:

- Has experience and enthusiasm for this genre.
- Offers references.
- Has experience with the type of edit required.
- Each participant listens, and answers questions in ways the other party understands.
- Will let you purchase 1-2 hours of editing/consultation, to ensure a “fit” for your goals.
- Bonus: Belongs to a professional editors association.
Or has long-term ties with a publisher or a local small press.
Or has a career as an editor.

For the editor, identify these issues with the candidate writer:

- The book and its writer are ready for the depth of critique you can offer.
- You agree on the basic scope of work and the estimated costs.

Step 2:

After an initial agreement, schedule a brief “first consultation” to review the scope of the project and at least a sample chapter.

For the editor, after an initial review, be sure:

- The book is ready to edit, or whether you should first recommend the writer complete a round of self editing and revision.
- The book fits the market goals the writer describes.
This is a “are we on the same track?” issue.

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Tip: Many new writers don't understand the literary and marketing requirements for specific genre. Literary, or nonfiction categories.

If you are providing editorial help beyond grammar and copyediting, you should be able to provide guidance for basic "market" issues.

- Provide the writer with information about *patterns* you identified in the initial review.
This might give the writer a chance to correct certain kinds of errors before you tackle editing the whole MS.

For the writer, after the first sample consultation edit, be sure:

- You understand this editor's comments and know how to take action.
- You're sure it's time to move ahead, versus more editing or revision by you first.
- The editor's estimate for the work meets your budget concerns.
- This editor can help you meet your goals for quality storytelling.

Step 3:

Share your mutual agreement in writing, which doesn't need to be more than email that covers:

- The tasks and budget agreed upon.
- The deadlines, and who is responsible for driving the schedule.
This might include notes about each party's availability over the project calendar.

For the writer:

- Provide specific guidelines for how you want the editor to budget time on the manuscript.

For the editor:

- Confirm your editorial scope, your rates, and the payment schedule.