

## Editing plans

An editing plan is designed to inform the writer of the editing which needs to occur for a given document. The plan provides support for its claims, outlines the editing process you recommend, and usually includes a timeline. You can develop an editing plan with other enclosures in mind—such as sample editing, a style sheet, or a more detailed estimate. While editing plans are usually completed for substantive edits, one can be developed for any level of edit. It's a good idea to write up an editing plan for long or complex documents, incomplete manuscripts, or any project with unusual printing procedures.

Development of an editing plan can involve multiple exchanges with your clients. After receiving a manuscript, you might contact clients to ask about the audience and learn more about the purpose of the document. This contact could be through email, a phone call, or otherwise in writing. Given this information, you could then proceed with the development of a draft plan which would be reviewed by them before the final editing work begins.

Begin developing a plan by evaluating the document using the rubric provided by Rude (239-241), Einsohn (13-15), or a similar process. The final objective of your evaluation is projecting as much of the editing process as possible. That's why you begin with questions about audience and purpose—naturally, that shapes editing. Your evaluation will help you build an editing plan—it is not the editing plan itself.

Every editing plan should:

- ✓ Make you look professional, organized, and worth your hourly rate.
- ✓ Provide context: what is the current status of the project?
- ✓ Describe your evaluation of the state of the document, objectives for editing, the process for editing the document, and your reasons for desiring these objectives and procedures.
- ✓ Clarify which style manuals, document conventions, or other authorities will be used in editing.
- ✓ Provide a timeline, in whole or in part: what is the next step? If possible, what is the path from the current time to a completely edited manuscript?
- ✓ Describe who will be doing the editing work at each step of the process.
- ✓ Address the preparation of other documents and components, such as illustrations and graphics.

## Format

Until you've gained enough experience to develop your own editing plan formats with confidence, write the editing plan as a memorandum or business letter. (Refer to the texts you used for IM 320 or similar courses for more information about these forms.) A combination of forms could be used—for example, you could write a cover letter to accompany a separate editing plan formatted as a business proposal.

Regardless of the form you select, use the appropriate style and tone. For new clients, more formal prose is a must—and you will need to explain editorial terms or conventions they may not understand. If you know your clients well, and they are familiar with your editing process, that can be reflected in your editing plan.

## Tips

- Editing plans are real communications between you and your clients—not just assignment you do for a course. So you don't have to follow every step of Rude's evaluation process. Instead, write a document that you could actually deliver to the writer in question. If you conceptualize this process carefully, writing the plan will tell you a lot about what you need to learn to become a better professional editor.
- Browse *Chicago* for information about document production which may illuminate this process—for example, see 78–80, 805–810, 841, and 858–859.
- Remember your audience. You don't necessarily need to include all of the information you accumulated while evaluating the document. The clients need to know information relevant to the project at hand. Include this information only if you think it would benefit your clients, or if you would like them to review it for accuracy. As noted above, if you've developed a relationship with your clients, some material can be safely omitted. (When in doubt: leave it.)
- If you've corresponded with your clients about a project, integrate the editing plan into that discourse—don't present it as an isolated document. For example, you might begin a plan with, “Fran, based on our email exchange from last week, I would like to edit this portfolio in the following manner . . . .”
- Include contact information—even for clients you know well, this is a nice convenience. (Most editors would use letterhead with this information pre-printed.)
- I am happy to review an editing plan with you before you submit your final vulture portfolio.