Copy editing protocols

By Nick Juliano

Juliano produced this report as a special project while a student at Ohio University. He is now a reporter for the Stockton (Calif.) Record.

An overview

Copy editing protocols are implemented to streamline the copy-editing process and make life easier for editors on copy and assigning desks alike. Historically, copy editors and reporters do not get along, said John Russial, associate professor of journalism at the University of Oregon. Copy editing protocols provide guidelines for when and how copy editors can change stories and are designed to smooth relations among the various desks.

Most papers have some kind of guidelines in place to specify when copy editors should check with reporters or assigning editors about changes in an article, Russial said. These guidelines usually come in the form of unwritten rules, but many papers also have in place specifically outlined protocols. Specific protocols help streamline the copy editing process and improve relationships between reporters and copy editors.

Russial moderated a forum at the American Copy Editors Society conference in March 2003. He said the forum was designed to get editors thinking about protocols and debate whether having them was a good or bad idea.

Copy editors and reporters do not get along because they do not understand each other's jobs, said Dick Hughes, editorial page editor for the *Statesman Journal*.

"Reporters see copy editors as people who just sit there and hack stories. Copy editors see reporters as people who are always late and don't give them enough time to write good headlines," said Hughes, who recently led a Society of Professional Journalist's seminar on relations between copy editors and reporters.

In their book *Coaching Writers*, Roy Peter Clark and Don Fry address how copy editors and reporters should work together. They say protocol could "lubricate the process for making last-minute changes in copy."

Protocol development should be a team effort among copy editors, assigning editors and reporters.

In their book, Clark and Fry give a sample protocol drawn up during a 1989 Poynter seminar. It lists 38 typical last-minute changes and outlines when a copy editor should consult with the assigning editor or reporter before making the changes.

Clark and Fry sample protocol

Changes in which consultation is not required:

1. Correcting a misspelled word.
2. Correcting an obviously misspelled name. If the name is odd or tricky, consultation is desirable.
3. Updating news in a story.
4. Making minor cuts for space.

5. Tightening or uncluttering sentences, unless they are obviously important sentences.
6. Correcting most violations of the stylebook. Some violations that accomplish specific purposes may be acceptable.
7. Clarifying the attribution, that is, making clear where certain information comes from.
8. Adding little facts, if they are obvious.
9. Localizing wire copy, unless controversial.
10. Eliminating casually libelous material, but depends upon the complexity of the story. Follow-up consultation is always required when it comes to libel.
11. Removing information from police story that implies conviction.
12. Resolving conflicts between the story and a graphic, photo or cutline if obvious.

Changes in which consultation is desirable

13. Filling a hole in the story, but consultation is required for a big hole.
14. Moving a sentence, but consultation is required if an important sentence.
15. Moving a block, but consultation is required if an important block.
16. Revising a problem headline.
17. Deleting obscenity unless crucial to the story.
18. Paraphrasing a quotation.

Changes in which consultation is required

19. Cutting a story that is less newsworthy than expected.
20. Changing a lead.
21. Revising for fairness.
22. Cleaning up quotations.
23. Changing a controversial fact.
24. Revising the tone of the story.
25. Reconciling inconsistency with past story.
26. Making major cuts.
27. Cutting a story that comes in longer than budgeted, if breaking news made it longer.
28. Editing a problematic photo.
29. Correcting factual or identification errors in cutlines, unless obvious.
30. Dealing with a source who calls in new information
31. Using anonymous sources against policy.
32. Pointing out conflicts of interest.
33. Holding a story.
34. Punching up a dull story.
35. Doubting a story.
36. Selecting a photo.
37. Cropping a photo.
38. Creating a sidebar.

Clark and Fry offer these guidelines "as stimuli for conversation among players in the newsroom" to help editors and reporters develop their own protocol for a newspaper.

A sample of newsroom protocols

Now we'll look at some newspapers that implement specific protocols or rely on unwritten rules in their newsrooms.

The St. Petersburg Times

At The Times, problems arise when copy editors are overly concerned with fact checking stories and call assigning editors with excessive questions, said Anne Glover, assistant managing editor for the copy desk.

Glover said the protocol smoothes operations at The Times — a 354,000 daily circulation newspaper with bureaus in five counties — because all the paper's copy is handled by one desk.

"The last thing the editors need out in the bureaus need is new copy editors calling them with questions about every little thing," she said.

At The Times, the protocol is "copy desk centric," Glover said. "You would be hard pressed to find an editor who knows we have these protocols."

Glover said the protocol has increased efficiency in the copy editing process. The Times has to meet 12 daily deadlines, so the copy editors practice what she calls "triage editing" — fixing noticeable mistakes but not nitpicking every detail. The Times' assigning editors do most of the fact checking and detail editing, leaving copy editors free to focus on editing large amounts of copy — most edit 15 to 20 articles each night.

The protocol also ensures that editors are not bothered with excessive phone calls late at night, and when copy editors call assigning editors know they are calling for a good reason.

At The Times, the protocol is one part of a copy editor's "desk guide," which is an outline of how senior editors think, Glover said. A senior copy editor wrote the protocol about 10 years ago. Having a set protocol defines the copy editors' job. Glover said the protocol is used as a teaching tool for new hires. Here's how the protocol appears in the Times' stylebook:

Editing guidelines

Well, you aced your tests and tryout, impressing the bosses with your expertise in grammar, style and punctuation, your ability to catch errors in stories and your knowledge of history and current events. Good work!

But now that you're here and you're faced with editing a live, deadline story, what are the ground rules? Just exactly how far can you go? How far should you go? What is really expected of you?

Here are some general guidelines:

Copy editors are encouraged to be skeptical and critical. They stand in for the reader and often provide a fresh view that improves the story. Reporters and city editors welcome good questions and feedback from the desk.

Before you call a reporter or city editor, read the whole story, particularly if you're ringing someone at home. Try very hard to call only once per story, and keep your questions brief. Remember that reporters and editors have already put in a full day. Don't argue finer points of editing with tired and harried reporters and editors. Hit them with the important stuff: potential libel, numbers that don't work, facts that don't check out, quotes that are missing words, sentences that don't make sense, holes in the story, names that are misspelled.

Your questions should be respectful and should not challenge the reporter's expertise or style. Be careful of offending inadvertently. A lot of ego can be invested in even a short story.

Unless you are on a tight deadline, you should do as much of your own fact-checking and other research as possible. Don't call reporters and city editors to ask questions that you can answer by checking the electronic library, the Internet or a library book – or that you should be able to answer by having read the newspaper that day. (However, you should use those resources only to double-check the reporter's work; you should not insert "facts" from your research without consulting either the reporter or editor.)

Often the fastest way to check minor facts is to shout out a question to fellow rimmers. "Is there really a street in Tampa called Boulevard?" gets an answer (yes) in two seconds from people who've been there. It might take five minutes to find a street directory and look up the answer. "Do we need quote marks around the Bill in C.W. Bill Young?" A library check might take three or four minutes and give you ambiguous information. A shout can give you an answer (no) in two seconds. The conversation also educates other on the rim.

You also can message a copy chief, a member of the stylebook committee or METRO DESK if you're trying to decide between conflicting answers. That, of course, can take a little longer.

If reporters and city editors learn that you call with important questions, they will quickly learn to respect you and will be more amenable to changes. You should be ready with specific suggestions to fix the problems you see. The reporter or editor might not always agree with you, but it's easier for them to edit your suggestion than to start cold. By the time you call, they likely have already started their next assignment and have mentally filed your story under "Done."

In general, as a Times copy editor, you should edit lightly unless you have a good reason not to. Any substantive change should be done in consultation with the originating editor or the reporter. A substantive change includes any revision to a news lead, a "lawyered" story or an editorial or a staff column. It also includes substantial rewriting or cuts to news stories in their home section. If you are unsure whether a change is substantive, ask someone; you'll soon become familiar with what's touchy and what's not.

Most of the time, you have done your job by posing the question. If the editor or reporter says, "We talked about it, and that's what we're going to do," it's their call. However, if the problem is very important – information that can identify a rape victim, for instance – say, okay, hang up and take it to another city editor or a desk supervisor. Let them decide if it's worth fighting over.

If you feel strongly about a change and you cannot reach the originating editor or the reporter, find another city editor, a desk supervisor or a copy chief to help you decide what to do. Don't crawl out on a limb by yourself; take a friend with you.

The desk edits copy for accuracy, clarity, completeness, libel, style, grammar and punctuation. Those are our primary editing duties, and we are held responsible for them. To a lesser extent, we edit to improve the writing. But we don't make optional changes. If it's a choice between your personal preference on wording and a reporter's, the reporter wins. If part of a story truly needs to be rewritten, you should work with the reporter or editor. Be prepared with constructive suggestions and a tactful explanation of why you feel the changes are needed.

This process protects the reporter and you. The reporter must face the public and sources. And, like a physician, your first priority is to do no harm. Inserting an error into a story is the worst thing a copy editor can do.

When you make substantive changes to a story, ALWAYS leave the original in notes mode. That way, the copy chief has something to check your work against. Be careful not to overuse notes mode. Don't use it for every comma and misspelled word, and be careful not to note out all the spaces between words. We've had a lot of words run together in the past few months because editors have not left an unnoted space between them. When you send a story over, it should be in publishable form.

Now for some personal advice: Take breaks. Don't sit and stare at the screen for prolonged periods. Get up and get a drink or stretch your legs about once an hour. The minute or two it takes to refresh yourself is time well spent. We need your mind clear and sharp.

You should be flexible and manage your time. Some stories just take longer, but you have to keep an eye on the MET RIM basket. Adjust the attention you give stories according to how backed up things are getting. It is unwise and unproductive to wring every little grammatical nit out of a story, only to find 20 slugs waiting in MET RIM to be edited. Then you and other rim editors have to rip through them heedlessly just to meet deadline. Manage your resources.

A final word: When you pick up a story and you don't have to do a lot of work on it, don't worry. Rejoice! Our editors and reporters have very high standards. Their good work makes your life easier. You're not being evaluated on how many changes you make to a story, just on how appropriate are the changes you do make.

The Charlotte, N.C., Observer

The Charlotte Observer has had a protocol in its newsroom for more than 20 years, said Michael Weinstein, features editor at the Observer. The protocol was established in response to a dispute between metro editors and copy editors, and it set guidelines for editors' and reporters' roles in the newsroom.

The Observer's protocol was designed to outline the responsibilities of copy editors and reporters, and it has become "a part of the culture" passed on to new employees through the years, Weinstein said. The protocol "sets the rules" by which editors and reporters abide. Having a protocol in the newsroom smoothes relations between editors and reporters, Weinstein said. With the protocol, editors and reporters understand one

another better and are more respectful towards each other when putting out the paper. Here is the Observer's protocol:

The Charlotte Observer protocol for copy editors/editors-reporters

This is a guide to help copy editors find their way through the sometimes murky issue of when to consult about changes they make in stories.
This is mostly just common sense, buttressed by an assumption of professionalism, courtesy and sensitivity on all sides.

To begin, some **principles:**

1. Copy editors are editors, not proofreaders. We are professionals who exercise judgment, who are skilled at word-editing, who want to help the reader understand the news.
2. Copy editors realize it is not our names on the stories, but the reporters', so we don't edit arbitrarily. We edit to improve.
3. Like doctors, if we cannot cure a story's ills we will, at the very least, do no harm.
4. When we change a story, we must be absolutely sure nothing we do changes its meaning or tone or in any other way makes it inaccurate.
5. When in doubt, consult, if for no other reason than to help educate our colleagues in good editing.

Some specifics:

A. We should always consult with the assigning editor or the reporter about:

1. "Jazzing up" a lead.
2. Editing for fairness or to remove editorializing.
3. Editing to change a story's tone.
4. Any change inside quote marks.
5. Any change that could alter the meaning of even one sentence in the story in such a way that might make it inaccurate.

B. In many areas, whether to consult depends on the magnitude of the change or whether the change would alter meaning. Other factors that sometimes affect whether we consult: how near deadline we are, whether the story is staff-written, how sensitive the story is, how important the story is.
Here are some situations when copy editors will often want to consult with assigning editors:

1. Moving a paragraph.
2. Cutting an unnecessary paragraph.
3. Filling in a missing word.
4. Clarifying sentences.
5. Moving or adding attribution.
6. Adding background.
7. Tightening wording in a lead.
8. Trimming information from a lead.

C. Sometimes we don't need to consult with assigning editors – assuming the editing we do is appropriate, helps the story and doesn't alter the meaning or tone. These things are essential to aggressive, skilled copy editing and we don't need to ask permission to do them:

1. Correcting grammar, punctuation, usage and style errors.
2. Correcting factual errors.
3. Adding factual information, such as locaters, calculating percentages, getting the correct name of an agency.
4. Cutting wordiness.
5. Clarifying language.

Explanations and feedback:

We need to be told if we make errors in copy editing. Assigning editors and reporters should know why changes are made. If a copy editor must make extensive changes in a story, or routinely makes the same change in the same reporter's story, we are obligated to communicate that to the reporter or assigning editor, who should talk about it with the reporter.

When a copy editor and assigning editor or reporter disagree about whether a change is needed:

1. Collaborate. Each editor should explain his/her position. For example, a note from an assigning editor, answering a questioned passage, that says only, "Let's keep it this way,"doesn't provide much information.
2. Make sure the copy desk slot knows what the issue is. He or she can help collaborate.
3. If the impasse remains – if either editor thinks the wrong thing is going into the newspaper – consult whoever's in charge of the newsroom.
4. Remember the rules of conduct: We're all trying to put out an excellent newspaper. We respect each other, even when we disagree. Remember the readers.

The Oklahoman

At The Oklahoman, the protocol was developed in response to constant complaints from editors and reporters about what the procedure was for handling questions with stories, said Joe Hight, managing editor of The Oklahoman.

"Before we had this protocol, I used to get complaints on a pretty regular basis," he said. But since the protocol's implementation, those complaints have nearly disappeared.

The Oklahoman's protocol was designed three years ago by the paper's "style committee," which comprises copy editors, reporters and assignment editors, Hight said. The committee drafted a protocol, which was then reviewed and revised with the input of other members of the staff.

"It was a very deliberate process with a lot of newsroom input," he said.

After the initial protocol was designed, the committee added an addendum, which provides advice for copy editors and reporters and gives each an idea of what the other goes through.

The protocol has greatly diminished the number of complaints within the newsroom and has increased cooperation between editors and reporters, even though "I think there's always going to be some antagonism between editors and reporters," Hight said.

The establishment of a protocol has been part of an effort to emphasize the importance of editors and reporters, Hight said, to get them to think as teams that work together as opposed to conflicting sides.

The protocol is provided as a part of the new hire packet given to incoming employees at The Oklahoman.

The Oklahoman's protocol

1. ANY QUESTIONS of fact pertaining to reporting are referred to the line editor, who either answers them for the copy desk or contacts the reporter and then relays the information to the copy editor. Examples of this would be conflicting spellings of names, unclear paragraphs and missing first references to sources. In general, copy editors do not contact reporters directly, but they may do so. Most of the time, line editors can answer questions without consulting the reporters because of their previous knowledge of the story, so copy editors consult the line editor first. If further information is needed, the line editor calls the reporter. If no line editor is available, the copy desk may decide a call to a reporter is warranted.

2. ANY QUESTIONS of fact pertaining to general knowledge and/or style are checked with the appropriate reference source. Examples of this would be spellings of town names, historical events, grammar, capitalization and style.

3. COPY CAN BE EDITED as needed, without consulting the line editor, to make the reporter's meaning more clear or to conform to style. Examples of this would be unclear writing, punctuation and awkward sentence construction. Exceptions: The line editor IS consulted if copy editors need to change the lead or a quotation, if copy editors aren't certain what meaning was intended in a passage, and in other special circumstances. (For example, if a school superintendent uses poor grammar, there might be an argument in favor of leaving it as it is.)

4. If A REPORTER BELIEVES a significant error was edited into a story, the reporter should discuss the matter with the line editor to determine whether this protocol was followed. If the matter needs further discussion, the line editor should talk with the supervisor of the copy desk, who will try to determine where an editing error occurred. The copy desk supervisor will be responsible for discussing the error with the copy editor and determining corrective action, which can range from discussing the change with the reporter/line editor to writing a correction for publication.

5. REPORTERS MAY ASK line editors to explain or look into significant changes or major errors, following the chain of responsibility outlined above, and editors should provide such feedback when it is requested.

ADDENDUM TO PROTOCOL

Minimizing errors is a team process — for reporters, line editors, copy editors and layout editors — and cooperation is key. Some suggestions:

For reporters:

* Take your notes and stories with you when you leave work, in case you're called for clarification.
* Call your line editor if you're particularly concerned about a story.
* Put notes of suggested cuts into your copy.
* Realize that space shortages are not the fault of the copy desk.

For copy editors:

* Realize that reporters are criticized for edited-in errors.
* It's easy for cuts to become personal to the reporter when the reporter's name is on the story.
* Reporters must deal with sources who may have been offended or irritated by editing changes.
* Some stories aren't written in inverted pyramid, and it's not always best to cut the ending.

The Detroit Free Press

The Free Press does not have a specific protocol, but it relies on general principles and unwritten rules to guide the copy process, said Alex Cruden, chief editor of the copy desks for the Free Press.

Cruden said the Free Press does not want a set protocol to get in the way of "actual communication," so instead the paper's copy editors are governed by generally understood but not specifically outlined rules.

"Anything that would really surprise" the reporter reading the paper the next day needs to be approved, Cruden said. Some changes that need approval include changing the lead, adding context or significantly cutting a story.

The absence of a protocol does not inhibit communication at the Free Press. Cruden said he encourages copy editors to talk about what they are working on, and copy editors go through a "trial and error" learning process.

The general rule is copy editors should fix what they know is wrong and raise questions about the rest.

"Fix what you know. Ask about what you need to know," he said.