



## Substantive edit checklist

The substantive edit is generally part of the content development stage of a publication. The editor's goal is to ensure that the document communicates effectively with the specific audience and accurately conveys the author's intended messages.

Substantive editing is separate from copy editing, which happens later and is about ensuring the completeness, consistency and accuracy of the document for publication. For more information about copy editing, see our [Copy edit checklist](#).

The substantive edit can include tasks from the copy edit checklist, but the document will still need a separate copy edit later. This is because substantive editing typically results in significant additions, deletions and revisions, all of which need to be carefully checked before publication.

The checklist below covers a basic range of things that could be looked at during a substantive edit. It's not intended to be definitive, because every project is different. Sometimes a client will want to focus on a particular aspect, such as fixing structural problems or applying plain language principles.

### What does the substantive editor check?

#### Structure

- Structure is logical at document, chapter, paragraph and sentence levels and reflects the way the reader will approach the material.
- Information is easy to find.
- Visual aids are genuinely helpful.

#### Language

- Language is clear and direct – plain English if required.
- Terminology, language and tone are suitable for the intended audience.
- No ambiguity. The reader doesn't have to try to deduce the meaning.
- Voice and tone are consistent – this is particularly important in multi-author works.

#### Content

- No unnecessary repetition.
- Argument is logical and advances clearly.
- Relationship between major points is clear.
- Flow is smooth and logical. No missing content. No missing steps in argument.
- Examples and quotations support the argument effectively.
- Headings are descriptive rather than generic and help the reader. Heading levels are logical.

- Reader's needs are anticipated – for example, by providing diagrams, illustrations, checklists, glossary.
- Assumptions about the reader's level of familiarity with the subject are reasonable and consistently applied.