Reviewing Documents Efficiently

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Editing another person's writing is difficult. And even the best editor's comments can confuse, perhaps insult the writer. Such were my worries when an external reviewer for a Shipley contract document submitted a spreadsheet of about 50 comments. The reviewer's first written comment was this: **"Recommend Shipley QC [Quality Check] the document to ensure correct language structure."**

This comment about language structure got my attention: "Oops, I must have let a grammatical sin slip by!" Shades of Berta Smith, my first grammar mentor. Berta, my supervising teacher, taught me grammar and punctuation rules before I, a student teacher, taught them to high school students down the hall. Berta's grammatical gospel covered many sins. But with Berta's help, I learned the basic rules of grammar, punctuation, and word usage. I also learned to cite the rules when reviewing a student's writing.

So when I got the reviewer's comment about needing a language edit, I was sure I had violated one of Berta's rules. But as I reviewed the spreadsheet of suggested edits, I didn't find a single grammatical error or even a punctuation gaff.

Instead, the reviewer's comments recorded the reviewer's personal preferences about the phrasing of individual sentences. Admittedly, a few comments did clarify my intended message, but the reviewer had not recorded a single language error. So much for the reviewer's first comment! Without agreement about what constitutes an error in language structure or even what a useful review should assess**, many document reviews are ad hoc, idiosyncratic, and always too little and too late.**

This recent Shipley experience with a reviewer's misleading opening comment encouraged me to revisit in this new newsletter article three suggestions for ensuring that document reviews are as useful and as efficient as possible:

1. **Reviewers for documents should have well-defined roles/assignments.**
2. **Reviewers should avoid suggestions that are clearly personal preferences about language unless the suggestion does improve the content.**
3. **Reviewers should use current writing or language guides, especially when citing language or punctuation rules they only dimly recall from an English composition class decades ago.**

My original version of these suggestions used the term *editors* instead of *reviewers*. My handy reference thesaurus suggests that the two terms overlap and are near synonyms. I settled on

reviewers because reviewers can enter the writing process at any point. In contrast, editors are more often thought to be contributors at a late stage to check grammar, punctuation, and language correctness.

Reviewers should begin their work with an early conceptual review of the idea for a document and of an early and sketchy outline/ storyboard for the entire document. Reviewers continue to have a role as text and graphics take shape and are inserted into the evolving storyboard. Without good reviewers, the best document can jump the tracks! Reviewers continue to be valuable contributors through the final proofreading and spellchecking phase.

The following newsletter discusses three suggestions for reviewers to keep in mind as they review a writer's work.

1. Reviewers for documents should have well-defined roles/assignments.

Shipley writing workshops routinely split a writing task into its overlapping levels (or subtasks). These levels are especially relevant because most documents today are team products, with multiple contributors and multiple possible reviewers.

Level 1--A document's purpose—the what, the why, the how . . . and identifying relevant content for intended readers/users

Level 2--Its overall design and structure . . . including page/screen layout and organization within chapters or linked screens

Level 3--Clarity and effectiveness of major sections (chapters, linked screens, subsections, and backup sections)

Level 4--Paragraph and sentence clarity (in both text or screen contexts)

Level 5--Mechanical correctness—that is, word usage, spelling, abbreviations, units of measurement, and consistency within repeated or referenced information

A reviewer's first question should be this one: **What level of document/computer file do you want me to review?** An answer to the preceding question is the only way a reviewer can be efficient.

Consider the following two review scenarios. Each is a realistic version of why reviews are often not useful. Most writers have experienced situations similar to these scenarios.

Scenario 1: Level 4 and Level 5 review comments when the writers want comments about Levels 1, 2, and 3. Levels 1, 2, and 3 should have the highest priority early in a writing process. Yet, sometimes reviewers do not have their priorities clear. They spend time rewriting preliminary text and correcting punctuation before the overall content and its associated text and graphics are even

settled. Such early work on sentence structure and mechanics is inefficient and often wastes time and money. Why polish draft text that might be deleted later?

Scenario 2: Level 1 and Level 2 comments when the writers want comments on Levels 4 and 5. Late in writing project, writers solicit a text and language review (the classic grammatical or correctness edit). If a reviewer revisits the overall scope and design of the document, efficiency again suffers. This is not to say that a late-stage reviewer should ignore big-picture problems, but reviewers (and their project managers) have the discretion to tell reviewers what level of review is appropriate. And if on-going reviews have been thoroughly conducted, no big-picture document problems should remain when the time comes for reviewers turn to grammatical and mechanical correctness.

So, to repeat, reviewers should always have assignments that specify what level or type of review is appropriate. Without such guidance, the best a reviewer can do is plunge into a document and comment on anything that seems to be a problem or an error. Such reviews are ad hoc chaos and a waste of time and money.

An Example of No Document Review Strategy. A field unit submitted a 300-page document to its regional office; the draft document was considered to be nearly ready for the printer. A dozen regional reviewers then attacked the draft! Each reviewer prepared a detailed spread sheet of errors, ranging from misplaced commas to content suggestions about how better to rework major sections. The field unit received the resulting spread sheets with well over 2,000 comments, but with no suggested priorities. The direction to the field unit was " fix the problems." Contradictory comments were frequent.

No managerial or review strategy guided the individual regional reviewers, and the field got no prioritized guidance about which problems to emphasize. Such is often the case when a contractor gets multiple emails from a dozen individual reviewers, with no guidance as to how handle the often-contradictory comments. Agencies should assign a single technical representative to screen all comments before they go to the contractor, with recommended revision priorities.

An Example of a Clear Review Strategy. This past week I completed an expedited late-stage review of a National Environmental Policy Act EA (Environmental Assessment). The agency manager wanted a last look for any legal compliance problems. He did not want a detailed language edit. His guidance to me and Shipley was very clear.

So, in my review of the EA, I did not choose to use the routine Shipley checklist of 21 NEPA review questions. Instead, I read the EA quickly to spot any compliance problem (also called fatal legal flaws). My review (prepared as a short written report) made three key recommendations for changes to the EA. My expedited review took less than a week and cost the client far less than if I had done a full NEPA review, including all 21 compliance items and comprehensive language edits.

Notice that in this final example, this late-stage review focused on Level 1 concerns (broad legal compliance questions). The client had already assumed responsibility for Levels 2, 3, 4, and 5. This process reverses the usual review process, when Levels 1 and 2 are early concerns, followed much later by Levels 3, 4, and 5.

2. Reviewers should avoid suggestions that are clearly personal preferences about language unless the suggestion does improve the content.

A reviewer's personal writing preferences are often a trap. We all would like to sign off on a document that is like one we would have written, assuming we had taken the time. Managers, for example, sometimes use expensive time and energy reworking, even completely rewriting, a subordinate's document. I always warn reviewers and managers who are reviewing a document not to worry if the document doesn't read quite like they would like, as long as the essential content is present.

A manager who ends up rewriting a subordinate's document is often signaling a managerial failure. A key managerial skill is to know when and how to delegate essential tasks. Writing a document is surely one such task. So a manager should be involved in coaching employees in document planning skills, such as conducting a document kickoff session. Next would come tips for collaborating on an initial storyboard/vision/outline of the projected document (or website). Many recent Shipley Group newsletters address these and other document planning skills. An archive of past newsletters is available at http://www.shipleygroup.com/environmental/index.html?pg=news .

Finally, I provide an example of a reviewer's personal preferences rather than substantive changes in language or content. Here is a simple two-sentence sample of text. Should a reviewer let it stand as written or is rewriting called for?

> **Original Text:** On Day 1, NEPA compliance should begin. Day 1 is that first day when the project proponent has a Proposed Action in mind, along with the project's preliminary rationale, called NEPA's Purpose and Need.

To repeat, should a reviewer let these two sentence stand as written? The two sentences do not have language errors, but a reviewer has to judge if a rewritten version is desirable. For example, two of the many possible revisions are the following:

> **Revision A:** NEPA compliance should begin on the first day when a project proponent has a Proposed Action in mind. Usually, the proponent has a rationale for proposing the project. This rationale is NEPA's Purpose and Need for the Proposed Action. [This revision eliminates the repetitive "Day 1" references and softens the emphasis on timing.}

> **Revision B:** The existence of an agency's Proposed Action is the signal for the beginning of the NEPA compliance. The agency proponent usually also has a preliminary rationale for the

Proposed Action (called the NEPA Purpose and Need). [This version shifts the emphasis to the Proposed Action.]

Neither Revision A nor Revision B makes major changes in the content. Yes, the emphasis changes in both revisions. Here is where a reviewer has to exercise personal judgment. But from my experience, I would advise a reviewer to let the original text stand as written. From my reading, neither of the revisions adds important new information.

Of course, a reviewer would have to explain to the writer why a revision is desirable! This would be difficult unless the original version had an obvious error or missing content. I discuss possible errors in the next section of this newsletter.

3. Reviewers should use current writing or language guides, especially when citing language or punctuation rules they only dimly recall from an English composition class decades ago.

Reviewers do confront writing errors on occasion. When an error does occur, they should explain the error, and they should show the writer or writers how to correct the error. These remedies often require a reviewer to cite current writing or language guides.

What errors are likely to occur in writing from professional adults? Not as many errors as one would expect. Especially with today's computer tools, writers are often warned about sentences with obvious errors, such as a failure to have number agreement between the subject and verb within a sentence.

Test yourself on the following six language samples. Which ones have true errors and which ones have language myths posing as errors?

1. Editing another person's writing is difficult. And even the best editor's comments can confuse, perhaps insult the writer.
2. The agenda listed the principle objectives for the Proposed Action.
3. Ending a letter with this closing: Yours Very Sincerely,
4. A summary of the revised budgetary benefits are causing us to revise our earlier financial projections.
5. The projected mine plan would adversely impact both water quality in the Big Sugar River and bird-nesting wetlands south of the Big Sugar In Logan Valley.
6. The Governor's budget proposal was consistent with the tenants of the emerging political movement.

A reviewer's initial problem is to spot possible errors in routine text. This presumes that the reviewer knows what sorts of errors to look for. In these six sentences, sentences 1 and 5 have language myths posing as errors. Sentences 2, 3, 4, and 6 have true errors. I verified four of the problems in the *Pocket Oxford American Thesaurus*, Second Edition (New York: Oxford University

Press, 2008). Any recent desk dictionary would have been equally good. Also, in this Internet era, a quick Google search could check up on the listed errors.

Here are brief explanations for each of the six language samples.

1 The language myth is that sentences cannot start with the conjunction *and*. The *Pocket Oxford American Thesaurus* discusses this myth in a usage box on pp. 32-33. It calls this rule "rank superstition." Its origins as a rule are murky, but likely it arose when teachers wanted to encourage students to connect two shorter sentences with a comma plus *and*. But a correct stylistic preference is to transition to a continued or expanded thought by opening the next sentence with *And*.

2 The sentence has a wrong word—*principle* should be *principal*. The *Pocket Oxford American Thesaurus* discusses this error on p. 654, According to the thesaurus, the two words are firmly separate in meaning, but confused because of their pronunciations. *Principal* is primarily an adjective, meaning primary or most important. *Principle* is a noun meaning a truth or a rule.

3 This contains a halfway error, but more of language custom. For decades, the complimentary closing to a traditional letter has had only an initial capital: *Yours very sincerely* followed a comma and then the signature of the writer. Search Google for complimentary closings to traditional letters.

4 The sentence has an error in subject and verb agreement. The plural verb *are* should be *is* to agree with the grammatical singular subject *summary*. This rule is covered in any basic grammar handbook used in high school or college writing classes. Optionally, look up subject and verb agreement in a Google search.

5 The language myth in this sentence is that *impact* cannot be a verb. Its use as a noun is thought to be only legitimate use. The *Pocket Oxford American Thesaurus* discusses this usage problem on p. 416. It records the increasing frequency of i*mpac*t as a verb, but still recommends that the better choice (in terms of style) is the verb *affect*. From my experience, environmental writers are increasingly writing sentences such as this one in example 5; I have ceased to replace the verb *impact* with *affect*.

6 The error in this sentence is the wrong word *tenant* in place of the correct word *tenet*. The *Pocket Oxford American Thesaurus* discusses both words on pp. 846-847. *Tenet* means a fundamental belief or rule while *tenant* means an occupant or resident.

Any reviewer presuming to correct another person's writing should be prepared to explain the rule, any content assumptions, or stylistic choices. Without cited reasons, reviewers are often just changing things "because it sounds better." Such review recommendations are ad hoc and idiosyncratic. *Neither the writer nor the reviewer is learning anything useful!*