

**CALIFORNIA
ENERGY
COMMISSION**

STYLE MANUAL

**FOR PREPARING CONTRACT AND
CONSULTANT REPORTS FOR THE
CALIFORNIA ENERGY COMMISSION**

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Arnold Schwarzenegger, Governor

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PREFACE

This style manual is intended to assist California Energy Commission staff, contract managers, and consultants/contractors when preparing a “consultant report” to submit under an Energy Commission contract.

If you have been awarded a contract to prepare a report for the Energy Commission, be sure to check these guidelines before starting any Energy Commission report.

If your contract is for technical research that results in an interim or final report for the Public Interest Energy Research (PIER) Program, do not use this *Style Manual*. Instead, please use the Energy Commission report: *Preparing Public Interest Energy Research (PIER) Program Contract Research Reports - Style Manual*, Energy Commission publication number CEC-500-2006-006.

The most recent version of this manual and templates for use with Microsoft® Word® that can be used to develop Energy Commission contractor/consultant reports are located at:

www.energy.ca.gov/contracts/consultant_reports/

The project’s Contract Terms and Conditions may provide additional information about producing Energy Commission consultant reports or other printed materials.

If you are not sure these guidelines apply to your report, or if you have any questions about the information provided in the guidelines, please contact your Energy Commission contract manager or e-mail Media and Public Communications Office staff at: mediaoffice@energy.state.ca.us

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ABSTRACT

This report is the manual of style to be used by consultants, contractors, or project teams that write reports funded by the California Energy Commission. This document will be placed online under the contracts section of the main Energy Commission website. Microsoft® Word® files for the document templates, covers, and credits pages can be downloaded from those pages as well.

This document may be revised as the Energy Commission feels is necessary. Please check the contracts/funding page on the Energy Commission's website for the latest version at:

www.energy.ca.gov/contracts/consultant_report/

Keywords: California Energy Commission, writing, style manual, style guidelines, consultant report, contractor report, publication process, report preparation, report format

CHAPTER 1: What This Report Is About

Introduction

The Energy Commission produces several hundred reports as well as other printed items each year. These documents are made available to the public and are placed on the Commission's website. The Commission contracts with various entities to write reports on specific topics. This manual is geared toward assisting contractors or consultants¹ in preparing these reports.

Please note that many Energy Commission contracts require that periodic progress or status updates be written. This manual does not cover those progress or status reports, including the final status report of a contract.

The Energy Commission believes that all its printed materials should properly reflect our image and identity such as name, seal, logos, and other relevant information. This principle is not to suggest that all printed documents be identical in appearance; however, all documents need to have a consistent design, be grammatically consistent, clear and concise, and have an instant identity with other materials the Commission has prepared.

As an author, you have the opportunity to demonstrate skill, creativity, and pride in your work as well as an obligation to meet the expectations of your audience and the Energy Commission. Readers should be able to rely on consistent, professional quality - regardless of the subject matter.

We understand that you need to know what is expected to produce a quality report. This *Style Manual* clarifies the approved style at the Commission, including information on the approval process and formatting your document. One chapter is devoted to writing, including strategies for organizing a document, editing sentences, grammar, punctuation, mechanics, and proofreading.

This *Style Manual* is available to all consultants preparing a report for the Energy Commission, and it is part of their contractual obligation to follow the Commission's report format.

When Commission staff members receive a report from a consultant, they should peruse the document to make sure it is free of grammatical errors, formatted to the Energy Commission's style, and is clear to the lay reader. If the report fails any of these criteria, it should be returned to the writer to revise to the Commission's standards.

Rather than develop a grammar book, we recommend that consultants purchase and use *The Gregg Reference Manual, Tenth Edition*. The Media and Public Communications Office also uses the *Associated Press Stylebook and Libel Manual* and recommends *The Dictionary of Concise Writing* to reduce clutter in prose.

¹ The terms "contractor" or "consultant" are used interchangeably. To reduce confusion, the company contracted by the Energy Commission to produce a report will, hereafter, be referred to as "the consultant." The report they are writing for the Commission is called the "consultant report."

When these manuals do not clarify an issue in grammar, mechanics, and usage, the office relies on *The Elements of Style* by William Strunk Jr. and E.B. White and the *Little, Brown Handbook, 10th edition*, by H. Ramsey Fowler and Jane E. Aaron.

If you have additional questions, do not hesitate to call the Media and Public Communications Office at 916-654-4989.

Why Should You Use This Style Manual?

The Energy Commission uses much of what's contained in this *Style Manual* for its own staff, Committee, and Commission-adopted documents. By using this *Style Manual*, you will ensure that Energy Commission consultant reports have a consistent appearance and will be acceptable under the terms and agreements for contracts. It is the Energy Commission contract manager's responsibility to ensure that any report done under contract follows this manual before final retention funds are released.

Using this manual will help you meet the needs of your audience and achieve your purpose because the *Style Manual* is based on the latest efforts of the Media and Public Communications Office.

Above all, using this *Style Manual* will free you from making decisions about formatting so that you can concentrate on the more creative elements of writing, the content of a document, the important work that you do best.

Above all, using this *Style Manual* will free you from making decisions about formatting and writing style so that you can concentrate on the more creative elements of writing, the content of a document—the important work that you do best.

There are legal grounds for "good writing." California Government Code Section 6219 says:

6219. (a) Each department, commission, office, or other administrative agency of state government shall write each document that it produces in plain, straightforward language, avoiding technical terms as much as possible, and using a coherent and easily readable style. (b) As used in this section, a "state agency document" means any contract, form, license, announcement, regulation, manual, memorandum, or any other written communication that is necessary to carry out the agency's responsibilities under the law.

Additionally, public funds pay for the reports. So, the public deserves the best document for its money. It deserves reports, papers, or presentations that are clear and well written.

Updates to the Style Manual

This *Style Manual* is a working document. The Media and Public Communications Office staff has tried to make it current; however, language, styles, and technologies change. This manual will be regularly reviewed, and any necessary changes will be incorporated into future editions.

The Media and Public Communications Office encourages your creative comments and constructive suggestions on improving the clarity of this manual and making it easier for you to use. Please contact our chief editor at:

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CHAPTER 2: Roles and Responsibilities for Preparing Consultant Reports

Roles and responsibilities for consultant reports should be clearly defined in the contract between the California Energy Commission and the consultant. In general, the roles include:

Role	Responsibility
Contractor / Consultant	Performs the work stipulated in a contract with the California Energy Commission. They are also the author(s) of the consultant report sent to the Commission, usually at the conclusion of the contract.
Consultant Contract Manager	Is the main point of contact for the contractor or consultant with the Energy Commission
Commission Contracts Office	The office that oversees all contracts done by the Energy Commission with an outside firm or agency.
Commission Contract Manager	The contract manager is the authorized representative of the Energy Commission responsible for administering the contract, establishing and maintaining a good working relationship with the contractor, and monitoring and managing to all contract terms.
Commission Project Manager	Occasionally, a consultant's project may contain multiple contracts. In that case, there is usually an Energy Commission project manager who oversees the entire project.
Media and Public Communications Office	Has overall responsibility for review, editing, and sign-off of all Energy Commission reports. M&PCO also manage the Commission's websites and handles publishing of consultant reports to the Internet.

Contract Manager's Responsibilities

The contract manager is the authorized representative of the Energy Commission responsible for administering the contract, establishing and maintaining a good working relationship with the consultant/contractor, and monitoring and managing all contract terms.

The following summarizes the Energy Commission contract manager's responsibilities:

1. Monitoring the contract progress and performance to ensure that the contractor is performing the services according to the quality, quantity, objectives, and time frames specified in the contract.
2. Keeping in frequent contact with the contractor by phone or e-mail, and intermittently conducting on-site visits.
3. Revising the schedule of deliverable due dates as long as the new dates are within the term of the contract.
4. Preparing a CEC-84, Contract Progress Evaluation Form. This form documents the progress of the project, noting any problems or delays. It is submitted to the Energy Commission's Contracts Office monthly or quarterly depending on the contract terms but is always required when approving an invoice.

Note: PIER contract managers do not complete a CEC-8. Instead the Progress Report (completed by the contractor) addresses the project status.

5. Keeping the Commission's Contract Officer informed regarding any potential problems or difficulties or changes in the contract.
6. Reviewing and approving the contractor's invoices to:
 - a. Substantiate expenditures for work performed, including travel and per diem, and the rates billed do not exceed the rates in the contract budget.
 - b. Ensure there are sufficient funds to pay for all services rendered and required in the contract.
 - c. Identify spending levels and consider partial reduction of contract funds and reassignment of funds (within the limitations of the Contract Manager).
 - d. Ensure retention is withheld from the invoice, according to the retention language specified in the contract.
7. Closing out the contract by:
 - a. Ensuring that all work is completed and accepted before the contract expires.
 - b. Approving the final products, including the final report and meeting, if required.
 - c. Verifying that the contractor has fulfilled all requirements of the contract before approving the final invoice and releasing retention.
 - d. Completing the Contractor Evaluation Form - STD 4, for consultant services contracts of \$5,000 or more and submitting one copy with the Final Report (if required) to the Contracts Office.
8. Verifying that one of the final deliverables, a consultant report, if applicable, meets all Energy Commission style and formatting contained in this *Style Manual*.
9. Overseeing the review and sign-off process (via a CEC Form 5) before publication of the consultant report on the Commission's website.

CHAPTER 3: Publication Steps for Consultant Reports

Publishing a report with the Energy Commission should not be an all-consuming process. It essentially breaks down into three areas (see Table 1 on next page):

- 1) Steps 1 through 10 are generally pre-submission steps done by the contractor and contract manager.
- 2) The general steps for document review and are reflected in **Steps 11 through 23**.
- 3) Publishing a report involves **Steps 24 through 29**.

This *Style Manual* should be reviewed at the beginning of the project report writing process, and format and styles must be followed.

California Energy Commission staff should use the latest version of the Publication Approval Form (CEC Form 5) available on the Commission's EnergyNet Intranet.

**Table 1: California Energy Commission
Report Creation, Review, and Publication Steps**

CONTRACTOR & CONTRACT MANAGER STEPS	1	Pre-planning and conceptualizing the consultant report.
	2	Outlining and planning chapters and sections.
	3	Draft of report written by contractor / project team.
	4	Draft of report edited. Cover and credits page added. Table of Contents created. Report formatted using Energy Commission style template.
	5	Draft of report sent to Energy Commission contract manager for first review.
	6	Contract manager adds comments and suggestions and returns report to contractor.
	7	Comments and edits included into report. (This may be repeated a number of times.)
	8	Draft final of report submitted in Microsoft® Word® file to contract manager.
	9	Contract manager does final edit, checking to make sure comments are included.
	10	"Final" version of report submitted to Commission in Word® with all corrections made. Graphics and other supporting files submitted with report on CD-ROM or (if smaller than 10 MB) via e-mail.
CALIFORNI ENERGY COMMISSION REVIEW PROCESS STEPS	11	Contract manager prepares CEC Form 5 to accompany report on sign-off route.
	12	Report sent to office manager for review and sign-off.
	13	Report sent to division chief for review and sign-off.
	14	Report sent to Media and Public Communications Office (M&PCO) for review, editing, and sign-off. M&PCO assigns publication number. Note: On consultant reports, M&PCO only edits the abstract and executive summary. The rest of the report is normally not edited, but is reviewed, by M&PCO.
	15	Reviewed report sent to policy committee presiding member for review and sign-off.
	16	Reviewed report sent to Executive Office for review and sign-off.
	17	Report returned to Commission contract manager.
	18	Edits incorporated into report by contract manager or by consultant/contractors (depending on what contract stipulates). Final retention funds released to contractor after edits completed and all files are sent to Commission. Note: M&PCO may request that the report be sent back to that office for a final review once edits are incorporated.
	19	Report given last, final review by contract manager.
	20	Contract manager creates Adobe® Acrobat® Portable Document Format (PDF) file, fills in document properties on both Word and PDF files, and creates ADA accessibility in PDF.
ENERGY COMMISSION PUBLISHING PROCESS STEPS	21	Contract manager sends Word®, PDF, graphics, and other files to Webmaster for posting on Energy Commission website and for archiving.
	22	Web Team: a. Checks Americans with Disabilities Act accessibility of PDF document. b. Checks PDF document properties. c. Adds report information to publications database. d. Puts report and graphic image of cover online.
	23	Webmaster sends PDF of final publication to Commission Library and Publications Unit. (These are usually sent at the beginning of each month on a CD-ROM.)
	24	Publications Unit prints master paper copy and prints limited number of inventory copies. Contract manager should contact publications if additional printed copies are desired.
	25	Publications Unit sends printed copies to state depository libraries.
	26	Webmaster archives electronic version(s) of publication to be kept indefinitely.

CHAPTER 4: Preparing Accurate, Consistent Reports

Before you begin writing, put on the hat of an inquisitive, reasonably well-educated lay reader. Pretend that he or she paid for this report and wants to understand how and why you spent the money. That's your audience. Even though colleagues in the energy industry may be the only people who read your report, you need to make the writing clear and understandable to a larger audience. Your reader may not speak or read English as a first language. So, you must write clearly and concisely.

Here are some suggestions to keep in mind as you write the report:

- Apply the test of completeness. Are all the pieces there? Are all the references clear and do those in the text match those in the reference section? Are the relationships between the partners and the players clearly explained?
- Apply the test of logic. Does the document flow and make sense? Is the need for the research clearly described? Is the technical approach clearly described? Do the conclusions make sense? Are they drawn from the analysis? Do the numbers check? Is it clear how the numbers were derived?
- Analyze data that you present in the report. If you present a picture, *graph*, or table, be sure that you discuss it in the text; do not just refer to it. Remember, not everyone wants to or can print in color, so it is best if your graphic can also be copied in black and white. Apply the “would this be clear if it were faxed” test.
- Make sure you substantiate each conclusion by the analysis contained in the report.
- Figures and tables must clearly relate to and be consistent with the text, and vice versa. (If the text says the generator had a capacity of 30 megawatts, the table should not say it was 31.2 megawatts.)
- Use consistent references to report performance specifications and results. For example, if you refer to a piece of equipment by its nominal nameplate rating, then use that reference consistently throughout the report. If, however, the desired number was the measured performance of the device (almost always different from nameplate), then consistently use that measured number. Do not mix the two in the narrative.
- The text needs to clearly refer to the attached appendices (if applicable). It should also explain how the material in the appendices relates to the text. If the content does not really matter, you should probably drop the appendix. References to multi-page appendices need to be specific to the page or section of the appendix, not just a general reference to “Appendix B.” Number appendices’ pages consistently.

If you have a question about what the report should include, contact your contract manager first. The Media and Public Communications Office is also available to discuss the report. Make sure you understand all the required parts.

CHAPTER 5: Content Style for Reports

Apply general rules for good writing to all reports and other written materials created or funded by the Energy Commission. The following books are recommended to assist authors in developing good writing habits:

Fiske, Robert Hartwell. *The Dictionary of Concise Writing: 10,000 Alternatives to Wordy Phrases*. Marion Street Press, 2002. ISBN: 0966517660.

Sabin, William A. *The Gregg Reference Manual (10th edition)*. McGraw-Hill Irwin, 2005. ISBN: 0072936533.

Strunk Jr., William, E. B. White, and Roger Angell, *The Elements of Style, Fourth Edition*. Longman, 2000. ISBN: 020530902X.

Style Manual Committee, Council of Science Editors. *Scientific Style and Format: The CSE Manual for Authors, Editors, and Publishers (7th Edition)*. University of Cambridge, 2006. ISBN: 097796650X.

University of Chicago Press Staff (Editor). *The Chicago Manual of Style (15th Edition)*. University of Chicago Press, 2003. ISBN: 0226104036.

The above books may disagree on some grammar and punctuation formatting, such as using a “serial” comma. The Energy Commission preference is the *Gregg Reference Manual*.

Writing Style

- Use the **active** voice whenever possible:
ACTIVE VOICE: The petroleum industry is building new storage facilities.
PASSIVE VOICE: New storage facilities are being built by the petroleum industry.
- The Energy Commission discourages the use of the first person (I, we, us, our) when referring to the author(s) in its reports. This is not to say that you should write in the passive voice. It is possible to write in the third person and still write in the active voice. For example:
 - Instead of third person passive voice: “It was found by the research team, or it was found by the researcher that...”
 - Use third person active voice: “The research team or the researcher found that...” or “The study found that...” or “Results showed that...”
- Writing in the third person requires that the authors refer to themselves as though they were referring to a third party:
 - First person: “We considered 12 different scenarios...”
 - Third person: “The authors (or “the research team” or “the researcher” or “this project” or some other similar third-party reference) considered 12 different scenarios...”

- Avoid using “there is,” “there are,” or “it is” because those phrases set up a passive voice sentence and obscure its meaning.
- Eliminate excess words. For example, say “To calculate the emissions...” NOT “In order to calculate the emissions...” *The Dictionary of Concise Writing* can help writers use fewer words to convey their message. For example, say, “The team analyzed ...” and not “The team conducted an analysis of ...”
- Avoid using “and so forth,” “e.g.,” or “i.e.” Instead, use “and so forth,” “for example,” or “that is,” respectively, or another appropriate substitute.

Acronyms and Abbreviations

An acronym is an abbreviation made up of the initial letters of a group of words and is pronounced as a single word. For example, HVAC (heating, ventilation, and air conditioning) is pronounced H-VAC. Abbreviations are the initial letters of a group of words but cannot be pronounced as a single word and in which each letter is spoken individually, such as CPUC and PG&E. The Energy Commission uses these two terms interchangeably, most often including abbreviations under the umbrella of acronyms.

Use acronyms sparingly! They are a form of shorthand for terms used repeatedly that are familiar to your readers. Don’t make up your own acronyms. This style of writing excludes the reader by introducing words that are only known to a “select few.”

An acronym should benefit the reader, not cause them to stop reading and start hunting for the first time the acronym was used. Acronyms may be disallowed at the discretion of the Energy Commission’s editors.

Follow these rules when using acronyms or abbreviations.

- Do not make up acronyms as shorthand for a group of words.
- Do not use the abbreviation “CEC” in reports or in other written materials, except if used in a table heading where space is critical. Use “California Energy Commission” at first mention, and then use “Energy Commission” throughout the rest of the report. You may use just “Commission” in subsequent references in the same paragraph as long as no other commissions are being mentioned. Return to using the full two words Energy Commission in subsequent paragraphs.
- Introduce acronyms by first using the full term, followed by the acronym in parentheses. Energy Commission style does not allow the use of acronyms in the abstract and executive summary because these sections may need to stand alone and because these elements are often read by a broader audience that may be less familiar with the subject matter. Very common acronyms or abbreviations are acceptable in abstracts and executive summaries. (See Table 1.)
- Do not introduce and use an acronym if it only appears once or twice in close proximity. Rare exceptions would be cases where readers are more familiar with the acronym than its actual referent.
- Do not use the U.S. Postal Service’s two-letter abbreviations for states in the United States. Instead, use the full state name (example: Sacramento, California).

Table 2: Common Acronyms and Abbreviations

Original Term	Acronym/Abbreviation
California Energy Commission	Energy Commission
British thermal unit	Btu
California Air Resources Board	ARB (not CARB)
California Department of Water Resources	DWR
California Environmental Protection Agency	CalEPA
California Independent System Operator	California ISO (not CAISO or Cal-ISO)
(California) Public Utilities Commission	CPUC
carbon dioxide	CO ₂ or CO2 (Note: Make sure the 2 it is not too small to read.)
cubic feet per minute	CFM
(United States) Department of Energy	U.S. DOE
Energy Action Plan	Energy Action Plan (not EAP)
Energy Efficiency Ratio, Seasonal Energy Efficiency Ratio	EER, SEER
ENERGY STAR®	ENERGY STAR® on first reference, followed by ENERGY STAR thereafter. Note: Should be all capitals.
Federal Energy Regulatory Commission	FERC
gigawatt / gigawatt-hour	GW / GWh
heating, ventilation, and air conditioning	HVAC
Integrated Energy Policy Report	IEPR
kilovolt	kV
kilowatt / kilowatt-hours	kW (small k, capital W) / kWh
liquefied natural gas, liquefied petroleum gas	LNG, LPG
Los Angeles Department of Water and Power	LADWP
MCF	MCF but in parentheses say (1000 cubic feet of natural gas)
megawatt / megawatt-hour	MW (all capitals) / MWh
nitrogen oxides	NO _x or NO _x
Nuclear Regulatory Commission	NRC
Organization of Petroleum Exporting Countries	OPEC
Pacific Gas and Electric Company	PG&E
photovoltaic	PV
Public Interest Energy Research Program	PIER Program
one quadrillion (10 ¹⁵) British thermal units	Quad
research, development, and demonstration	RD&D
Sacramento Municipal Utility District	SMUD
San Diego Gas & Electric Company <i>Note: An ampersand is the correct usage in the company's name.</i>	SDG&E
Southern California Edison Company	SCE
Southern California Gas Company	SoCal Gas
sulfur oxides	SO _x
United States	United States (not U.S. unless it precedes an abbreviation for a federal agency)
United States Environmental Protection Agency	U.S. EPA (not EPA)

Bulleted Lists

Consider using a bulleted list for complicated sentences like the following example:

This report provides policy recommendations to conserve resources; protect the environment, the economy, and public health and safety; and ensure reliable, secure, and diverse energy supplies.

The above is correct, but it is clearer if bullets are used.

This report provides policy recommendations to:

- Conserve resources.
- Protect the environment, the economy, and public health and safety.
- Ensure reliable, secure, and diverse energy supplies.

Note: *Gregg Reference Manual* (p. 106) states that you should “...use periods after short phrases that are essential to the grammatical completeness of the list.” In the above example, you should not use semicolons at the end of the first and second bullet. Nor would you put the contraction “and” at the end of the second bullet. The above bulleted items are incomplete sentences on their own, but because they grammatically complete the lead-in phrase, periods are used.

In bulleted lists, use “parallel construction” for the items in your list. For example, if one item starts with a verb, all items should start with a verb; if one item begins with a noun, all items should begin with a noun, and so forth.

Use the following guides for punctuating bulleted lists:

- Start each bulleted element with a capital letter.
- Place a period at the end of each listed element that is a complete sentence.
- Incomplete sentences should not have a period unless they are “essential to the grammatical completeness of the list.” (See note above.)
- Semicolons or commas should not be used.
- The word “and” should not end the second to the last bulleted item.

Do not use small graphic files in place of the standard bullets.

Format for Bulleted Lists

1) The hierarchy for bullets should be:

- Bullet item (round, solid disc)
 - Second level bullet (open circle)
 - Third level bullet (solid square)

- Fourth level bullet (hyphen)

2) Add an additional return (extra line) at the end of the bullets and before the next paragraph.

3) Bullets use standard / normal text (Palatino, 11 pt.) but should only have a 4-point spacing following the paragraph. It is included in the blank document template, but you may have to change this manually. To do that, highlight the bulleted section, go to pull-down menu:

Format>Paragraph>Indents and Line Spacing>Spacing After = 4 points

4) Always format bullets with a hanging indent, indenting 0.25-inch from the line above with the hanging indent at 0.50-inch from the line above.

Capitalization

Do not capitalize words to make them stand out in a text. For example, “The Department offered its services” is incorrect and should be “The department offered its services.”

Just because acronyms and abbreviations are most often capitalized does not mean that you must capitalize the terms when they are written out. For example, you would not capitalize heating, ventilation, and air-conditioning (HVAC) system before listing the acronym in parentheses.

Do not capitalize words in the following situations:

- Do not capitalize “state” unless the text specifically says “the State of California.”
- Use “energy crisis”, NOT “Energy Crisis.” A proper noun, however, like “2001 Energy Crisis” would be capitalized.
- Use the lower case for “project” or “program” or “model” unless the term is an official part of a name or title, such as “Sunrise Transmission Project” or the “PIER Program” or the “Cost of Generation Model.” (In subsequent references to the project or program or model, use the lower case for the term even though it’s capitalized when you use the official name. For example, regarding the Sunrise Transmission Project, subsequent mentions would be to “the project” if you don’t want to use its full name.)
- Use “website” (all one word, lowercase) and not “Website” or “web site.” However, use “Web page,” “Webmaster,” and “the Web.” Per the *Gregg Reference Manual*, to maintain a consistent style, it is better to retain the capital “W” until a majority of these terms (such as “World Wide Web”) lose their initial cap as well. “Website, however,” has lost the initial cap in most technology publications and websites.
- Do not capitalize “city” before the name of a municipality. For example, “city of Sacramento,” not “City of Sacramento.” The actual name of the city is Sacramento, California. For some cities, the word “city” is part of its formal name, such as the City of Industry, California.

- Do not capitalize any term that is not a proper name or title.
- Do not capitalize “staff.”

Words that **should** be capitalized are:

- Governor, Legislature, Senate, and Assembly (when pertaining to California).
- Northern California, Southern California, Central California.

Please note that the terms that are capitalized may disagree with some grammar conventions. These are Energy Commission style for using these terms.

Compound Adverbs

Don't hyphenate compound adverbs: “publicly owned utilities,” “newly created.”

Compound Adjectives

Many compound adjectives are hyphenated when they come before a noun: “investor-owned utilities.” They are not hyphenated when they come after the verb: “the utilities are investor owned.”

Internet and E-mail Addresses

You can configure Microsoft® Word® to automatically create hotlinks to Internet addresses (URLs, short for Uniform Resource Locator) and a mail-to link for e-mail address. Creating the hotlink changes the text to blue and underlines the text (in Word® default settings). When a user clicks on the link, the text color changes to purple. Changing the Word® file to Adobe® Acrobat® sometimes incorporates the hotlinks. Please make sure the addresses are correct and tested before submitting a report.

Try to not split Internet addresses across two lines. If you need to, put the website address on a separate line, centered. Or if the URL is still too long, reduce the point size. For example:

<http://www.energy.ca.gov/2007publications/CEC-180-2008-001/CEC-180-2008-001.PDF>

http://www.energy.ca.gov/2007_energypolicy/notices/2007-08-16_workshop_notice.html

Italics

Italicize the name of all books and reports. For example, use *2005 Integrated Energy Policy Report* and *2004 Energy Policy Report Update*. Do not underline. If the information cited is from a magazine, put the article title in quotations and the magazine name in italics.

Use italics, not quotation marks, to introduce new technical terms. Include such terms in a glossary, if appropriate.

Language of Report

When writing the report, use American, not British, English.

Legislation

(Referencing Legislation in Energy Commission Documents)

For consistency, the following format should be used when referencing all legislation in reports or other documents:

Bill # (Author, Chapter #, Statutes of “year”)

Example: Senate Bill 1 (Murray, Chapter 132, Statutes of 2006)

After that first reference, reference the bill as an abbreviation (SB 1) unless it has a formal title.

If a bill has a formal title, the first reference should include the formal title followed by the bill information. For example:

Petroleum Industry Information Reporting Act (Senate Bill 1444, Holmdahl, Chapter 1055, Statutes of 1980)

After that first reference, reference the bill as a shortened title (PIIRA or whatever the act is commonly called).

If a bill has not been signed into law, the reference would be to the bill title (Senate Bill 1) with additional references as the abbreviation (SB 1).

Numbers

In a list in linear text, use numbering (in parentheses) to indicate the order in which tasks should be done, to suggest chronology or relative importance among the items, or to clearly separate the items. For example:

When repairing the machine, the researchers: (1) gathered the parts, (2) assembled the subsystems, (3) connected the subsystems, and (4) conducted tests to establish baseline performance.

When establishing the policy, the state considered (1) wind turbines, both old and new; (2) energy conservation programs that encourage consumers to reap the benefits of off-peak electricity; and (3) photovoltaic installations—including emerging technologies that use thin-film materials—in regions with superior insulation.

Otherwise, do not use numbering, as in the following example:

There are three key drivers of natural gas prices: supply, demand, and storage capacity.

Here are other rules for numbers:

- Use numerals for 10 and above; spell out all numbers one through nine, EXCEPT when indentifying:
 - Percentages (2 percent)
 - Dates (June 2, 2005)
 - Page numbers (page 6)
 - Chapter numbers (chapter 4)
 - Energy increments (1 megawatt, 9 kilowatts)
 - Sentences that include a list of identical items, some of which are fewer than 10 and some are more: “We ran 2 trials in April, 5 in May, and 14 in June.”
 - Table and Figure numbers (Table 4, Figure 6)

- Always use commas in numbers that are five digits or larger: 12,400; 245,678.
- Insert commas four-digit numbers when they are used in tables or columns and are optional in text, unless needed to make the number clear.
- Never begin a sentence with a numeral, including a year. “The energy crisis began in 2000,” NOT “2000 marked the year the energy crisis began.”
- Always use a zero before a fraction smaller than 1.0. Use 0.25, not .25.
- Treat related numbers alike:
Last year we sold 21,557,000 items; this year, nearly 23,000,000.
- Repeat the word million (billion, and so forth) with each figure to avoid misunderstanding:
\$5 million to \$10 million (NOT: \$5 to 10 million).
- Use the metric system (International System of Units, or SI) or English units—whichever is most appropriate to the report. When referring to temperatures, however, use Fahrenheit along with Celsius following in parentheses—for example, 212°F (100°C). Note that there should not be a space between the temperature, the degree symbol, and the letter. For executive summaries, use both SI and English units of measurement, to support a greater understanding by a lay audience. Use of other standard English measures (e.g., acre-foot, two-by-fours) is always appropriate.

Page Breaks

If a subheading is at the bottom of the page, but the text jumps to the next page, put a page break before the subheading. Font metrics may be slightly different depending on the computer operating system. Including a page break will ensure that headings are not left alone at the bottom of a page with no content.

Percentages

Always spell out the word “percentage” instead of using the % symbol except when used in a chart or graph. For example:

- The U.S. Labor Department reported that September’s unemployment rate fell 0.2 percent.
- The sales tax rate in California can vary from 7.0 to as much as 8.5 percent. Fifty years ago, the tax rate was 2.5 percent. It increased to 3.5 percent four decades ago. It has never gone down.
- It is permissible to use the % symbol in graphs and charts.

Punctuation

Apostrophes and Quotes

Use “smart” (also called curly or typographic) quotes (“ and ”) and apostrophes (‘). These quote marks and apostrophes have a slight angle to them to distinguish them from the inch- and foot-mark.

Brackets

Use brackets for parenthetical material within parentheses. (Within the parentheses, separate the text [parenthetical material] from the rest of the sentence.)

Colon and Semicolon

Use only one space (not two) after a colon or a semicolon.

Commas

Use a serial comma style throughout the report.

Example: The research team tested the first, second, and third models.

Note: The comma after “second” is called the serial comma and separates the terms in a simple series.

In a serial list that has multiple units in each element of the list, use a semicolon instead of a comma to clarify groupings.

Example: The breakfast menu items were coffee, tea, fruit juice, or milk; bacon and eggs; cold cereal and milk; hot oatmeal with cinnamon, apples, and cream; assorted sweet rolls; or fresh fruit and yogurt.

Use commas to set off the main elements in an address or a title following a person's name.

Example: The Energy Commission has been located at 1516 Ninth Street, Sacramento, California, for more than 20 years.

Example: Mary Jones, director of the project, is in charge of the contract.

Commas in Dates

Do not put a comma between a month and a year (July 2007), but do put a comma between a date and the year and after the year if in a sentence.

Example: The Declaration of Independence was signed on July 4, 1776, in Philadelphia, Pennsylvania.

Note: Use the standard American method of dating of month, date, and year.

Hyphen (-), En Dash (–), Em Dash (—)

When in doubt about whether to hyphenate a word, look it up in the dictionary or the *Gregg Reference Manual*. Words with the prefix “non”, “anti”, “pre”, “pro”, “multi”, “co” are not hyphenated, except when “non” is used with a proper noun, such as non-English.

Words with a prefix that ends in the same letter as the root word are hyphenated.

Example: She suffered from a pre-existing condition.

Use for any set of words you want understood as one unit, but use them sparingly.

Example: It was an out-of-date idea.

Use to join compound modifiers, unless one of the words is an adverb ending in “-ly.” Compound modifiers are two or more adjectives or adverbs that, if used separately, do not describe the word they modify:

- The utility offers consumers many energy-saving ideas.
- She was a newly elected senator. (“-ly” adverb, no hyphen)

Use an **en dash** (–) between a range of numbers. From the Insert Menu, select Symbol > Special Characters > en dash.

Use an **em dash** (—) instead of a double hyphen (- -). Do not add a space before or after the em dash. From the Insert Menu, select Symbol > Special Characters > em dash.

Percentage Symbol

Spell out the word “percent” if there is only a single reference to a percentage.

Example: The state and local sales tax in the area was 7.75 percent.

If there are multiple references within a sentence or paragraph, do not use the % symbol.

It is permissible to use the % symbol in graphs and charts.

Period Spacing

Use a single space after a period. Do not double space. If you've used double spaces, use the find and replace function in Word® to find double spaces and replace them with single spaces.

Quotation Marks (“ ”)

Use around titles of chapters, sections, article titles, or a coined word or phrase.

- We read the chapter “Progress in Energy Programs,” from the *Energy Efficiency Report: 1998*.
- The staff reviewed the “widget” design.

Special Characters and Symbols

Microsoft® Word® has a listing of special characters that you can use when typing. To view the special characters, go to Insert > Symbol. These special characters make use of the “Symbol” typeface that comes with and is installed by Microsoft® Word®. These special characters are the same across computer platforms. For symbols that are not in the standard typeface or font family, please contact Media and Public Communications Office to discuss using them in a report.

Underlining

Do not use underlines. Use **bold** or *italics*.

Do not use underlines to differentiate a header or section. Use the style setting for that heading.

CHAPTER 6: Word Usage and Misusage

The following words are those most misused in Energy Commission documents. For more information on usage, check *The Gregg Reference Manual* or *The Dictionary of Concise Writing*.

additionally - also; and; as well; besides; beyond that (this) even; further; furthermore; moreover; more than that (this); still more; then; too; what is more.

adopted, approved, passed, enacted - Amendments, ordinances, resolutions, and rules are adopted or approved. Bills are passed. Laws are enacted.

adviser, advisor - The California Energy Commission uses a Public Adviser, not an advisor, but the Commissioners have advisors.

affect, effect - "Affect" is a verb that means to change or influence. "Effect" is typically a noun that means the result.*

Correct: The oil spill affected marine life for months afterward.

Incorrect: The effect of the oil spill on marine life was devastating

* Although affect can be a noun, we hardly ever use it at the Energy Commission. Effect can also be a verb, but we rarely use it.

aid, aide - Aid is assistance. An aide is someone who serves as an assistant.

assistance - aid, help, succor

assure, ensure, insure - "Assure" means to promise. "Ensure" and "insure" are often used interchangeably, but use "ensure" for more general meanings for "to make certain." Reserve "insure" for legal and financial matters.

because of, due to - Use "because of" to match cause to effect. "Due to" is an adverb, which can be used when preceded by a linking verb. See examples.

Correct:

Because of the plants' lower efficiency, which makes them less competitive, some parties remain concerned that a significant portion of these plants would be retired in the near future.

Some parties are concerned that a significant portion of these plants would be retired in the near future due to the lower efficiency of these plants that makes them less competitive. (Although correct, please note how this sentence is wordy and lacks emphasis.)

Incorrect:

Due to their lower efficiency, some of these plants are less competitive, and some parties are concerned that a significant portion of these plants would be retired in the near future.

before - Use "before", not "prior to".

brand names - Do not use brand names to describe a process unless that process is being used. The same is true for other common brand names, such as Scotch® tape, Kleenex® tissues, and Coke®. Always capitalize brand names.

brief (concise, short, succinct) summary or synopsis - Just say “summary” or “synopsis”. Adding one of the adjectives listed would be redundant.

call into question - challenge, contradict, dispute, doubt, question.

capitol, capital - The word “capitol” refers to the buildings in, for example, Washington, D.C., and Sacramento. The word “capital” means the city where the seat of government is located. Do not capitalize it. Used in a financial sense, capital refers to money, equipment, or property. For example:

- The state capitol is located near the Energy Commission.
- The Energy Commission is located in the state capital.
- They had the necessary capital to underwrite the project.

concurrently - as one; at once; jointly; together.

contractions - Do not use contractions in external Energy Commission reports, notices, and letters.

contrary to - after all, apart (from).

currently - now, today. (Note: If sentence uses present tense, you may not have to use the adverb.)

data/datum - “Data” is plural. “Datum” is the singular form.

effectuate - achieve, bring about, carry out, effect, execute, realize.

e-mail - The word e-mail is not capitalized unless it begins a sentence. The word should be hyphenated as e-mail.

entitled - Use “title”.

eventuality - event, occurrence, outcome, delete.

- Kodak should have prepared for this eventuality.
- Kodak should have prepared for this outcome.

expenditure - cost, expense.

facility - bathroom, building, factory, hospital, jail, office, place, plant, prison, school.

farther, further - The two words are commonly interchanged, but there is a distinction worth observing: farther serves best as a distance word, further as a time or quantity word. You can chase a ball farther than the other fellow; you pursue a subject further.

FAX (all capitals) is the approved substitute for facsimile transmission.

federal: Capitalize “federal” only at the beginning of a sentence and for corporate or government entities that use the word as part of their formal names, such as Federal Express and Federal Trade Commission.

first introduced - introduced.

given the fact that - because, considering, for, given, in that, since, when.

government - Capitalize “government” only at the beginning of a sentence and never abbreviate it.

Governor - It should be capitalized at the beginning of a sentence, when used as a stand-in formal title (“The Governor signed the bill...”), or before the governor’s name (Governor Schwarzenegger signed the bill...). Do not abbreviate in any usage.

Homepage - Homepage is one word and is always expressed with a capital “H.”

however - The *Associated Press Style Manual* suggests that you not begin a sentence with the word however. Although the Media and Public Communications Office adheres to this principle in usage, it is one area where experts disagree. *The Gregg Reference Manual*, for example, notes this disagreement and concludes that the writer must determine where to place a transitional expression.

imply, infer - “Imply” means to suggest; you imply something by your own words or actions. “Infer” means to assume, to deduct, or to arrive at a conclusion; you infer something from another person’s words or actions.

impact - A strong word, impact denotes a forceful impingement, a collision, a violent communication of force. Often it is used when all that is intended is effect or influence, as in this example: “One of the questions raised by the Mayor’s attack on the Governor is its impact on their collaboration to give Sacramento an opportunity to vote on a new charter this year.” If the term environmental impact is quoted from a report, then it may be used in that context. Otherwise, environmental effect, environmental damage, or affect the environment are preferable.

importantly - Avoid by rephrasing.

Incorrect: More importantly, he paid for the damages.

Correct: What’s more, he paid for the damages.

Incorrect: With the breeze freshening, he altered course to pass inside the island. More importantly, as things turned out, he tucked in a reef.

Correct: With the breeze freshening, he altered course to pass inside the island. More important, as things turned out, he tucked in a reef.

in advance of - before.

in agreement with - according to, by, following, in keeping with, in line with, in step with.

in excess of - above, better than, beyond, faster than, greater than, larger than, more than, over, stronger than.

in force and effect - active, at work, effective, in action, in effect, in force, in play, working.

in order that - for, so, so that, that.

in order to - use to.

in place of - for.

in response to - after, because of, by, due to, following, for, from, in, out of, owing to, through, with.

in short supply - meager, rare, scant, scarce, sparse.

in sufficient number or quantity - enough.

in terms of - about, as, for, as to, by concerning, for, in, of, on, regarding, respecting, through, under, with, delete.

in the vicinity (of) - close by, close to, near, nearby.

initially established - established.

Internet - Internet is always expressed with a capital "I."

irregardless - "Irregardless" is non-standard English. Use "regardless."

is compliant with - complies with.

is subject to - depends on, hinges on.

its, it's - Do not confuse "its" with "it's." "Its" is the possessive form of the third person, singular, neuter pronoun "it." "It's" is a contraction of "it is" or "it has."

jargon - Do not use jargon in Energy Commission documents. The audience of your document may not understand technical jargon, and street jargon may demean your audience or your document.

locality - area, city, district, locale, place, point, region, site, spot, state, town, zone.

memorandum of understanding - agreement.

methodology - method. When developing estimates of market size, data extrapolation methodologies may be useful. When developing estimates of market size, data extrapolation methods may be useful.

Note: When discussing a set of methods or procedures used, then "methodology" is appropriate. If it's only one method, use method.

minimal - brief, least, lowest, minor, not much, scant, short, slight, smallest.

minimize - decrease; lower; reduce.

mitigate - moderate, soften, lessen, reduce.

move forward - advance, continue, go on, happen, move on, occur, proceed, progress.

occur - "Occur" refers to an accidental or unscheduled event. "Take place" refers to a planned event. An accident cannot "take place," nor can a business meeting "occur."

on a regular basis - bimonthly, biweekly, daily, hourly, monthly, regularly, weekly, yearly.

on-line - hyphenated except when talking about the specific Internet access company America Online.

open to the public - public. "The Energy Commission business meeting is public."

operational - active, live, running, working.

over - "Over" means physically above. If you mean a greater amount or quantity, use "more than".

owing to the fact that - because, considering, for, given, in that, since.

percentage point (unit) - Say "point". Example: The U.S. Labor Department reported that the September unemployment rate fell 0.2 points, to 5.4 percent.

policy maker - "Policy maker" is two words, not one.

power plant - "Power plant" is two words, not one.

preventative - preventive.

principal, principle - "Principal" refers to someone who is first in rank or authority or describes something that is first in rank or authority.

- He was the principal of the school.
- It was the principal reason for the part's failure.

"Principle" means truth, doctrine or rule of conduct, such as an uncompromising principle of honesty.

prior to - Use "before".

raise questions about (on) - challenge, contradict, dispute, doubt, question.

ratepayer - "Ratepayer" is expressed as one word. Bill payer and other similar words, however, are not.

regardless of the fact that - although, but, even though, still, though, yet.

remains to be seen - do not know, is not (now, yet) known, is uncertain, is unclear, is unknown, is unsure.

split infinitive - There is a precedent since the 14th century for interposing an adverb between to and the infinitive it governs; avoid the split infinitive unless the writer wishes to place **unusual stress** on the adverb.

Incorrect: to diligently inquire.

Correct: to inquire diligently

staff - "Staff" is a singular noun and requires a singular verb. It is also called a collective noun, but it is used as a single unit.

Wrong: Staff are involved in the project.

Right: The staff is involved in the project.

Right: The staff members give regular updates and participate in briefings.

state - Do not capitalize when it stands in place of California.

statue and statutes - "Statue" is a likeness sculptured, modeled, or cast into a solid substance. "Statutes" pertain to decree in law.

take into account - allow for, consider, provide for, reckon with, regard, weigh.

that is - delete.

Incorrect: This relates to the cost that is incurred by start-up firms.

Correct: This relates to the cost incurred by start-up firms.

there's / there are - Do not use this contraction. In most instances, there will be a subject-verb disagreement, and it will be misused.

Incorrect: There's many ways to approach the problem.

Correct: There are many ways to approach the problem, but there's only one correct way.

the state (or city or county) of - delete unless referring to the "State of California."

under - "Under" means physically below or underneath. If you mean a lesser amount or quantity, use "less than."

unproven - unproved.

utilize or utilization - use.

we - Do not use first person (we, us, or they) or third person (they, them, their) in reports, notices, or formal letters when referring to Energy Commission staff or the State of California.

Webmaster - Webmaster is one word and is always expressed with a capital "W."

website - The term is one word, lower case.

whether or not - if, whether

who - "Who" and "that" may refer to persons. Use "who" when referring to individual persons. Use "that" when referring to groups, types, classes of persons.

which - "Which" and "that" refer to places, objects, animals, things, and others. Use "which" for nonessential clauses. Set off "the which clauses" with commas. Use "that" for essential clauses. Do not use commas.

Nonessential words, phrases, and clauses are not needed to complete the structure or meaning of a sentence. Nonessential elements supply supplemental, parenthetical, nice-to-know information.

The report, which was completed and submitted on time, still requires substantial revision.

Essential words, phrases, and clauses are needed to complete the sentence. They cannot be removed from the sentence because they provide need-to-know information.

The report that the consultant submitted is complete, but the report that staff prepared will need additional work.

CHAPTER 7:

Parts of Consultant Reports

Report Sections

Energy Commission consultant reports contain the following sections, in the following order:

- Cover page (required).
- Credits page (required) with Legal Disclaimer (required). The Energy Commission disclaimer is ALWAYS included. Disclaimers from other agencies or organizations are optional and should be placed on the otherwise blank page following the credits page (the back side of the credits page when printing double sided).
- Acknowledgments page (acknowledgments are optional).
- Citation (required). Normally, the citation appears at the bottom of the acknowledgments page. If there are no acknowledgments, the citation appears at the bottom of the preface or the “back side” of the credits page (see instructions later in this chapter).
- Preface (optional).
- Table of Contents (required, followed by List of Figures and List of Tables, if needed).
- Abstract, including Keywords (required).
- Executive Summary (required).
- References (if applicable).
- Glossary (if more than 10 acronyms or abbreviations are used, it is required).
- Bibliography (if applicable).
- Appendices (if applicable).
- Attachments (if applicable).

Except in very short reports (20 pages or less), each chapter must start on a new, right-hand, odd-numbered page. Even in short reports, “front matter” sections and the executive summary should always start on a new page. If the preceding section ends on an odd-numbered page, insert a blank page to make the next section begin on the right-hand, odd-numbered page. To view an example of a properly formatted contractor’s report, please visit our website at:

http://www.energy.ca.gov/contracts/consultant_reports/

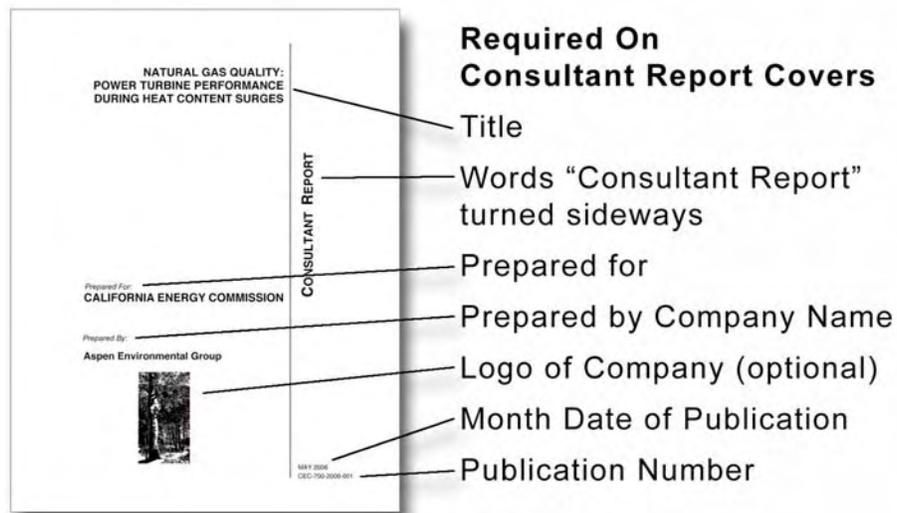
Report Cover and Credits Pages

Covers and credit pages for Energy Commission's consultant reports use templates that are available from the Energy Commission's website at:

www.energy.ca.gov/contracts/consultant_reports/

Complete the information on the credits page as fully as you can. You will be asked to provide the following information on those pages. Covers, credits page and blank pages on the reverse of those are not given page numbers.

Figure 1: Consultant Report Cover



Cover

Elements used in Consultant Report covers are shown in Figure 1. Titles should be descriptive of the report. They are in ALL CAPITAL LETTERS in Arial 18 pt.

All Energy Commission external publications (reports, papers, presentations, brochures, flyers, fact sheets, CD-ROMs, and so forth) are assigned a publication number. The new format for publication numbers became effective January 1, 2005. It corresponds to American National Standard Z39.23-1997 for formatting and creating standard report numbers for technical reports.

The format for publication number is

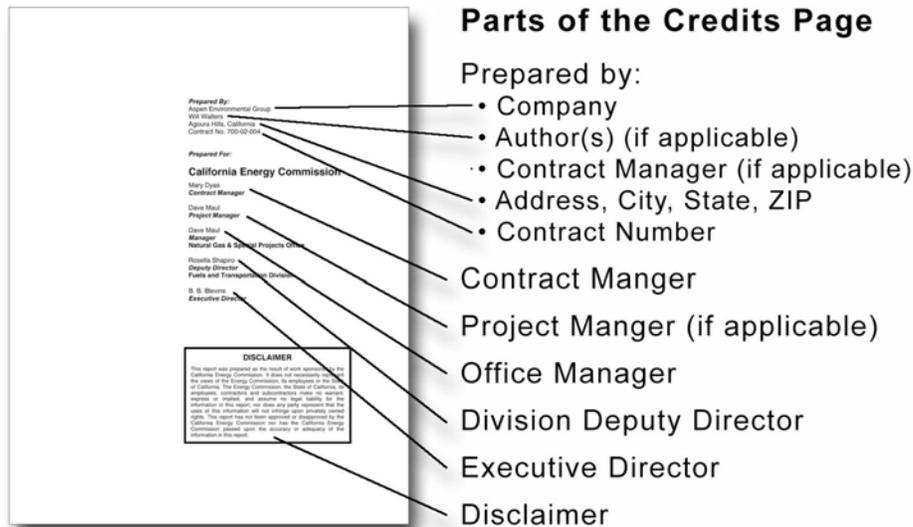
CEC-XXX-YEAR-XXX

The publication number parts are: the Commission's ID, the division or office ID for which the report is written, the year the report is published, the sequential number of the report for that division.

The Energy Commission will fill in the publication number when the report reaches the Media & Public Communications Office for editing and review.

Credits Page

Figure 2: Consultant Report Credits Page



The Credits Page requires the following parts:

- Name of primary author(s)
- Author's company, organization, or affiliation
- Location of author's company, organization, or affiliation (city, state, and zip)
- Contract/ Agreement number (**complete** contract, grant, work authorization, and/or project number(s), as applicable)
- Name of Energy Commission contract manager and project manager
- Name of Energy Commission office manager
- Name of Division Chief
- Executive Director - Note: No Commissioners names are used on consultant reports.
- Energy Commission disclaimer

The following disclaimer on Consultant Report credits page is mandatory.

DISCLAIMER

This report was prepared as the result of work sponsored by the California Energy Commission. It does not necessarily represent the views of the Energy Commission, its employees or the State of California. The Energy Commission, the State of California, its employees, contractors and subcontractors make no warrant, express or implied, and assume no legal liability for the information in this report; nor does any party represent that the uses of this information will not infringe upon privately owned rights. This report has not been approved or disapproved by the California Energy Commission nor has the California Energy Commission passed upon the accuracy or adequacy of the information in this report.

The credits page should be only one page long. If more space is required, then please contact your Energy Commission contract manager.

Additional Legal Disclaimers

The California Energy Commission's Legal Disclaimer is provided on the Consultant Report credits page template. If any other participating organization needs a legal notice on the document, please provide it on the separate page following the credits page.

Publication Numbers

All Energy Commission publications (reports, papers, presentations and speeches, brochures, flyers, fact sheets, CD-ROMs, DVDs, and so forth) are assigned a publication number. Presentations given at workshops and hearings are not assigned a publication number (at this time) unless a specific request is made.

The format for publication numbers became effective December 4, 2004. It corresponds to American National Standard (ANS) Z39.23-1997 for formatting and creating standard report numbers for technical reports.

The format for publication number is

CEC - XXX - YEAR - XXX - suffix - format id

The publication number's parts are:

- The Commission's identification with the ANS.
- The division, office, or program area number for which the report was originally written.
- The year the report is published.
- The sequential number of the report for that division.
- A suffix (if needed).
- A format identification (such as -BR for brochure, -CD, -DVD).

Use a hyphen between each part.

Staff members in the Media and Public Communications Office will assign the publication number when the document reaches them for editing and review.

Suffixes at End of Publication Numbers

Suffixes are added by the Media and Public Communications Office to the end of the publication number only if necessary to differentiate various versions, volumes, editions, or parts of the same document. The suffix is preceded by a single hyphen.

Other Report Sections

Acknowledgments and Citation Page (Optional)

This page comes before the preface and table of contents and is where page numbering begins with lowercase Roman numerals (i, ii, iii, iv, v, vi, and so forth.).

Acknowledgments

This section acknowledges or expresses appreciation to those who participated in the writing of the report. It may be a paragraph or a bulleted list of names and, if appropriate, their affiliations. Acknowledgments are optional. If acknowledgments are not included, do not create an acknowledgments page simply for the citation. Instead, put the citation at the bottom of the preface page. If there is no room at the bottom of the preface, then list the citation at the bottom of the blank page following the credits page (back side of credits when printing double sided).

Citation

It is mandatory to include a citation for your report in the following style:

- Author last name, author first name (or initial). Note: If there are multiple authors, list with chief author's name first, or list alphabetically. The first name in the series should have the last name followed by first name; all subsequent authors have the first name, then the last name. Use commas between authors' names.
- Year of publication.
- Report title in italics.
- California Energy Commission.
- Energy Commission publication number.

Typically, the citation is located at the bottom of the acknowledgments page. As stated, if there are no acknowledgments, the citation should go at the bottom of the preface page, or if there is no room there, place it at the bottom of the blank ("back side") page following the credits page.

Citation Examples

Please cite this report as follows:

Wolman, H., R. E. Moon (Engineering International). 2007. *Widgets and More*. California Energy Commission. CEC-500-2006-987. (That is, Woolman and Moon work for Engineering International, so this optional method of listing authors incorporates both the authors and the company they work for.)

Additional examples:

Burt, Charles, Darren Cordova (Irrigation Training and Research Center, California Polytechnic State University). 2002. *Electric Load Shifting in Irrigation Districts - California's Program*. California Energy Commission. CEC-400-2002-002.

Unnasch, Stefan, Michael Chan (TIAX, LLC). 2007. *Full Fuel Cycle Assessment: Tank to Wheels Emissions and Energy Consumption*. California Energy Commission. CEC-600-2007-003.

Table of Contents

Include the following sections in the table of contents:

- Preface (optional)
- Acknowledgement (optional)
- Abstract and Keywords (required)
- Executive Summary (required in all consultant reports)
- Chapter number and title followed by subheadings using the following format:
 - CHAPTER 1: Chapter Title in Title Case (Heading 1)
 - Subheading (Heading 2)
 - Sub-subheading (Heading 3)
- Appendices (if applicable) (Enter appendix letters and titles in the table of contents manually)
- Attachments (if applicable) (Enter attachment numbers and titles in the table of contents manually)

Generate the table of contents using Microsoft® Word®'s automated feature. To do so, go to Insert > Reference > Index and Tables > Table of Contents > OK. Add at least two levels of heads (no more than three) under the table of contents to help the reader know the contents of the chapters.

For a preface and abstract, it may be necessary to enter a few periods before the page number so that the dot leader works properly. Note that appendix and attachment listings must be entered by hand. Do not provide page numbers for appendices or attachments.

Following the table of contents, generate the list of figures and the list of tables, if needed, using Word®'s automated features. To do so, go to Insert > Reference > Index and Tables > Table of Figures. Under "Caption Label" choose either Figure or Table, then in Options, Style, choose "Figure caption" (for a figure) or "Table caption" (for a table) > OK.

Update the table of contents, list of figures, and list of tables after all editing has been completed, and proofread to ensure that the entries are complete and correct. (Microsoft® Word®'s automatic table of contents feature, while very useful, is not perfect and can occasionally mis-create entries.)

The table of contents should use a right-hand tab, set at 6.5-inches, and with a dot leader for the page numbers. Set other tabs (for subheading and sub-subheadings) at 0.25- and 0.50-inch. Break long titles using a soft-return (shift-enter) and a hanging indent.

Figure 3: Example of Table of Contents

TABLE OF CONTENTS	
PREFACE	i
ABSTRACT	vii
CHAPTER 1: What This Manual Is About	1
Introduction.....	1
Presentations.....	1
Why Should You Use This Style Manual?.....	2
Updates to the Style Manual.....	2
CHAPTER 2: Publication Steps for Papers, Reports and Presentations	3
Reports and Papers.....	3
Presentations.....	5
Report Sequencing.....	6
CHAPTER 3: Preparing Accurate, Consistent Reports	7
Writing Style.....	9
Acronyms and Abbreviations.....	10
Bulleted Lists.....	12
Summary.....	12
Capitalization.....	13
Compound Adverbs.....	13
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Internet and E-mail Addresses.....	13
Italics.....	14
Language of Report.....	14
Numbers.....	14
Page Breaks.....	15
Percentages.....	15
Punctuation.....	16
Apostrophes and Quotes.....	16
Brackets.....	16
Colon and Semicolon.....	16
Commas.....	16
Commas In Dates.....	16
Hyphen (-), En Dash (-), Em Dash (—).....	17
Percentage Symbol.....	17
Period Spacing.....	17
Quotation Marks (" ").....	17
Special Characters and Symbols.....	18
Underlining.....	18

Abstract

All Energy Commission reports are required to have a short abstract. This concise, informative summary of the report should be less than 300 words—about a half page, single spaced. (You can use “Word Count” in the “Tools” menu of Microsoft® Word® to check the number of words.)

The abstract should address the report’s purpose, scope, methods, and major findings, including the report’s results, conclusions, and recommendations. Abstracting services publish abstracts to help readers determine whether a report is targeted to their area of interest; therefore, it should be understandable as a stand-alone document. The abstract should not contain undefined symbols, abbreviations, or acronyms, and should not refer to specific elements of the main report. It should not refer to other reports unless it is essential to clarify the document’s purpose. If the report is a supporting document to another report, that information should be noted. Do not, however, include citations in the abstract.

The abstract must contain 5-20 keywords that will help search engines and other databases track the report's subject matter. **Do not repeat words.** The keywords should be listed separately five lines below the abstract. Separate each word by comma—followed by a space—with no ending punctuation. For example:

Keywords: solar, energy, photovoltaic, PV, cell, panel, building, integrated, BIPV, electricity production, distributed generation, CSI, emerging, renewables, program, rebate

Executive Summary

The executive summary is a final report in miniature, containing all the key information. It summarizes the report and should include the following headings:

- Introduction or Background
- Purpose (outlining the broad purpose)
- Objectives (if appropriate)
- Conclusions and/or Recommendations

These sub-headings should appear in the table of contents.

The executive summary is intended to be short (preferred length is 2-10 pages). It can use a succinct, bulleted format to summarize the pertinent points under each of these sections, or can be more conversational (but still succinct). Assume a non-technical, management-level readership.

The introduction summarizes the purpose of the report and explains the reason the Energy Commission wrote the report. An introduction should give the relevant background and overview. It should define (at an intelligent layperson's level) the issue or problem being addressed by the report.

As a report summary, the executive summary should not present new information that is not found in the main document, and the executive summary should not repeat the abstract.

Do not cite references in the executive summary, and with rare exceptions, do not use acronyms or abbreviations.

The Executive Summary uses the same “Title Style” that is used on preface and abstract titles.

The executive summary marks the division between front matter, using lowercase Roman numeral pagination, and the body of the report. Thus, the first page of the executive summary will always be page 1 (Arabic numbering) of the report.

Chapters and Section Headings

Chapters should be numbered (CHAPTER 1:, CHAPTER 2:, and so forth in upper case) followed by a colon, a space, and then the chapter title in title case.

Use a soft return [shift-return] if you need to break the title into two lines. Try to not leave orphaned words (words left alone). Instead use a soft-return to group words.

You do not need to capitalize the following words, unless they begin the title:

a an and by for or the

Example:

CHAPTER 1: How You Should Create Excellent Titles for the Energy Commission

This example is awkward because it orphans the word “Commission.” Break the line (with shift>return) to group common words together:

Good:

CHAPTER 1: How You Should Create Excellent Titles for the Energy Commission

Better:

CHAPTER 1: How You Should Create Excellent Titles for the Energy Commission

For sections within each chapter, **DO NOT USE** scientific or technical section numbering (Section 1.1, Section 2.1.6).

References

The references must list all documents cited in the body of the report. List references in a standard alphabetical format. Use Palatino Linotype font, 11 point (or one of the other approved body fonts). Please check that all of the references contained in the body of the report are accurate and that the full citation for each reference is listed in the references section.

For formatting of references, consult the following books:

Sabin, William A. *The Gregg Reference Manual (10th Edition)*. McGraw-Hill Irwin, 2005. ISBN: 0072936533.

Style Manual Committee, Council of Science Editors. *Scientific Style and Format: The CSE Manual for Authors, Editors, and Publishers (7th Edition)*. University of Cambridge, 2006. ISBN: 097796650X.

University of Chicago Press. *The Chicago Manual of Style (15th Edition)*. University of Chicago Press, 2003. ISBN: 0226104036.

List any documents referred to in the appendices in a reference section in that appendix; that is, each appendix carries its own references section.

Glossary

If the report uses more than 10 acronyms and abbreviations, please provide a glossary with definitions for each acronym. Use Microsoft® Word®'s table feature to create a two-column format with the acronym or abbreviation in the left column and the definition in the right column.

Bibliography

A bibliography includes references that were used in preparation of the report not cited in the report. This section is optional. If used, consult the same reference books mentioned in the references section, above, for formatting guidance.

Appendices

An appendix is supplementary material that is usually produced by the report's author(s). Designate appendices by capital letters (Appendix A, Appendix B, Appendix C, and so forth), not numbers.

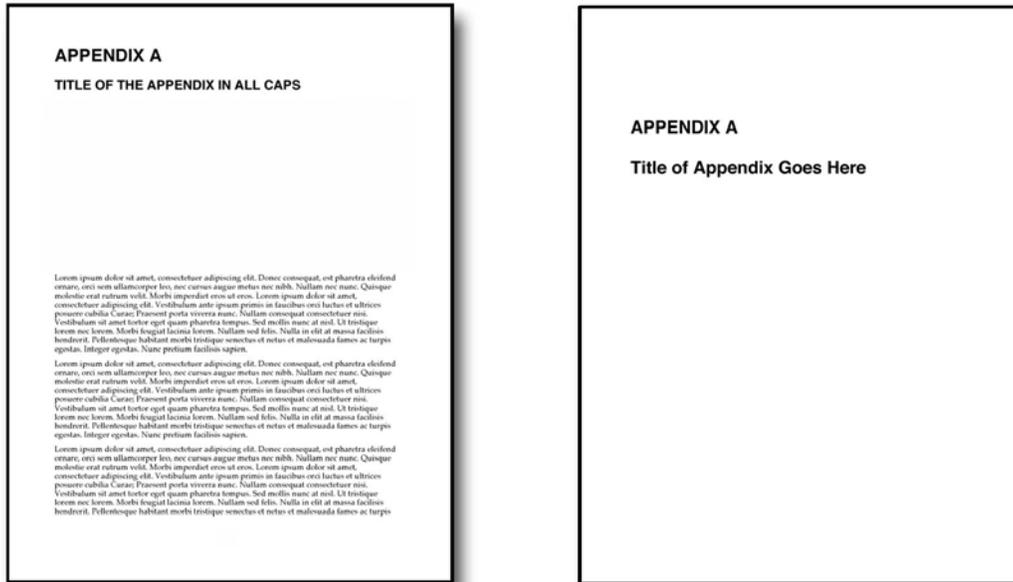
The body of the report needs to refer clearly to the attached appendices. References to multi-page appendices need to indicate the specific page or section of the appendix, not just a general reference to "Appendix D." The report should also explain how the material in the appendices matters to the text. If it does not really matter, the appendix probably should be dropped.

If small enough, appendices will usually be a part of the actual report. There are two formats for the appendix cover page. An appendix cover page should appear similar to the following in **Figure 9**. The version on the left is the preferred because it saves paper as you would need an additional blank page so that the content starts on the right hand side. You can put the title of the appendix in all caps or in title case.

Appendices page numbering should include the letter of the appendix followed a hyphen and then by the paper number. The cover page and the blank page behind it (if used) are not numbered.

For example: A-1, A-2, A-3; B-1, B-2, B-3; and so forth

Figure 4: Examples of Appendices' Cover Pages When Included as Part of a Report



Separate Appendices

If a document's file size (with appendices) is more than five or six megabytes, the appendix should be published as separate volume from the main report. All appendices must be either part of the main document or published as separate files. Appendices that are separate volumes are given their own cover and the same credits page as the main report. Appendix publication number is the same as the main report, but the suffix -AP is added to the end of the number (-APA, -APB, -APC, and so forth for multiple appendices that are published as separate volumes). See **Chapter 8** for additional information.

If the appendix has been previously published by another organization or agency with a different cover, it receives an Energy Commission cover page but no credits page.

Further, if the appendix has been previously published by another organization or agency, you must provide written permission from the original publisher for the Energy Commission to post the material on the Energy Commission website indefinitely. See **Chapter 8** for details.

Attachments

An attachment is supplementary but supporting material that may not directly relate to the report. For example, attachments can include a collection of news articles that appeared on a certain topic. To attach this material, you must provide written

permission from the original publisher allowing the Energy Commission to post the material on the Energy Commission website indefinitely. This written documentation should be given to the Webmaster and explained in the attachment.

Attachments should use the Consultant Report Cover Template.

Attachments are designated by roman numerals (for example., Attachment I, Attachment II). See **Chapter 8** for more details. On the cover page where the words "Prepared By" are located, delete the words "prepared by" and include the following statement verbatim:

This document is an attachment to a report published by the California Energy Commission. The Energy Commission did not fund this document, but the author(s) of the Commission report has(have) attached it as a supporting document.

The California Energy Commission wishes to thank the copyright holder, *[fill in name of author and/or publisher or whoever holds copyright]*, for permission to republish this document in electronic format on the Commission's website.

Please contact this document's original author or publisher for additional information about the document.

Templates

Once the report is written, you must format it using the Commission-approved styles. Energy Commission staff must use the report typographic styles described in these guidelines. They are summarized in **Chapter 9: Formatting Style Matrix for Reports**. The style template—and boilerplate cover and credits page templates—are on the Energy Commission’s “EnergyNet” Intranet website at:

http://energynet/Exec/doc_production/index.html

To use the new Energy Commission Report Template, follow the steps in one of these methods:

Method #1 - If Document Has Not Been Written

1. Download the Blank Report Template file from the Documents Production Page on EnergyNet, the Commission's intranet website.
2. Open the file.
3. Use **Save As...** to save the file with a different file name as a regular Word® file (.doc) instead of a .dot file.
4. Begin writing the document. Use the pull-down style menu to format various headings, sections, and parts as you go along.
5. Save the file as you normally would.

Method #2 - If Document Has Already Been Written

1. Open the Word® file of a document that is already written. Note that you may have already inadvertently used styles that are generic to Word® or from another older document. You do not want these styles to be transferred to the new document as it may confuse the formatting of your report.
2. Use **Save As...** to save the old document with a new file name as **text-only** (old_document.txt). This will strip out any previous formatting that may mess up the template.
3. Close both the original document file and the new text-only file.
4. Download the Blank Report Template file from the Documents Production Page on EnergyNet, the Commission's Intranet website.
5. Open the file.
6. Use **Save As...** to save that template file with a different file name as a regular Word® file (.doc) instead of a .dot file.
7. Do one of the following:

- a. Open the text-only file and copy and paste the entire text into the .doc file and then save.
 - b. In the “**Insert**” pull-down menu, click File... and insert the .txt file into the regular Word® file.
8. Save the file as you normally would.

Cover and Credits Page

The cover and credits page is included as part of the blank report template Word® file with the proper blank pages and page numbering. If you are having problems with the cover and credits page interfering with the report layout, you can add those later after the body of the report is formatted and completed.

In creating the title for the report, don’t leave orphaned words by themselves on a line. Use common sense as to where the breaks should be placed.

Inserting a Cover/Credits Page File to a Report

To insert the cover and credits page Word® file(s) to another Word file, do the following:

Go to the point just before the place in the document where you want to insert the cover and credits pages. In the pull down menu go to: Insert>File...> then locate the file’s name you want inserted and insert it.

You may need to adjust the page numbers in the footers. To do this, there needs to be a **section break** after the blank page following the credits page (fourth page front the front of the report). In the footer of the preface page, turn off the ‘Same As Previous’ in the footer control panel so the footer will not be the same as having no footer on the cover and credits page. Set the page numbering to Roman numeral i.

Blank Pages

Blank pages should be inserted after the cover page, the credits page, preface page, table of contents page, acknowledgements page, abstract page, and before each chapter so the new section or chapter will start on the right-hand side of the report when bound as a “book.”

The one exception is when there is no acknowledgments page; in that case, if the citation will not fit on the preface page, the citation should be inserted at the bottom of the otherwise blank page that follows the credits page.

Number all blank pages from the acknowledgments page onward (using Roman numerals). Do not number the cover or credits pages.

Figures, Graphs, and Tables

Figures, graphs, and tables (graphics) should be clear and readable. The graphic should be introduced in the paragraph before and explained fully. Do not download and use lower resolution graphics from the Internet, such as in **Figure 12**. While these may appear to look fine on your computer monitor, when printed the picture will bit-map and look blurry.

The title or label should be part of the report and not created as part of the graphic. The reason is that the graphic may have to be resized to fit the page. If the label is part of the graphic, the size of the label will change depending on the resizing of the graphic.

The figure title should use the "Figure Title" style in Arial, 12 pt., bold, centered like this:

Figure 5: Example of a Graphic Used In a Report



SOLARA is the first apartment community in California to be fully powered by the sun and is the first project delivered under the California Energy Commission's New Solar Homes Partnership Program.

Photo Credit: Community HousingWorks, developer/owner of SOLARA.

Fonts contained within figures, graphs, and tables can be either serif or sans serif as long as that font presents the information clearly and is readable. Most, however, use a sans-serif font like Arial or Helvetica for the information in figures, graphs, or tables. **Chapter 9** provides guidance for the typography of table cells and column heads.

Captions or sources listed below a figure, graph, or table must use the style specified in the formatting matrix in **Chapter 9**. Captions and sources should also be separate from the figure or table and not embedded in the graphic file because of accessibility issues.

If used, the list of figures and list of tables should be automatically generated in a manner similar to the table of contents. If a figure or table title is particularly long, hand-edit it in the list of figures/list of tables as you see fit.

Original graphics files (for tables, charts, and so forth) must be submitted with your report. (See **Chapter 11**.) If a chart or graph was created in Excel®, then that Excel® file should also be submitted with the report.

Use of Colors in Graphs and Figures, Size of Fonts, and Other Graphic Elements

Many times our reports are photocopied only in black and white. Therefore, it is important to use colors in charts, graphs, and figures that will reproduce well on a photocopy machine. Think and plan ahead for future readers because a chart may be photocopied from a photocopy. You want the information to be clear and easy to understand; the numbers should be large and clear enough to be read.

Additionally, graphs, and figures may need to be reduced in size to fit on a page within the text. Make sure the font size in the graphic is large enough to be read if the graphic is shrunk in size.

Graphics or figures should be created at a minimum of 300 dots per inch.

Footnotes

Use footnotes (not endnotes) in Energy Commission reports.² Use them sparingly to briefly clarify terms or concepts that the average reader may not understand. Place footnotes at the bottom of the page on which they appear. Do not place footnotes at the end of a section.

Insert footnotes using Word's® footnote feature: Insert > Reference > Footnote. Footnote numbering should automatically readjust as footnotes are added or deleted.³ Enter footnotes after periods or commas.

Do not use footnotes in report or chapter titles, and do not footnote headings or subheadings.

Page Breaks

If a subheading appears at the bottom of the page, but the text jumps to the next page, put a page break before the subheading. Font metrics may be slightly different

² The footnote number appears in the text as a superscript; the footnote is at the bottom of the page.

³ Microsoft® Word® will automatically superscript the footnote number at the bottom of the page. The Footnote Reference should be converted to Palatino 11pt., as shown in these examples. Use Footnote Text style for the footnote itself. Do not add an extra space between footnotes; the spacing is built into the style.

depending on the computer operating system. Including a page break will ensure that headings are not left alone at the bottom of a page with no content.

Pagination

Use Palatino Linotype 10 pt. for page numbers, centered at the bottom of each page.

Pagination begins on the acknowledgments and citation page (as Roman numeral - i, ii, iii...) and continues in lowercase Roman numerals through the preface, table of contents, and the abstract. The cover and credits pages are not numbered. Number the blank pages but do not put "This Page Intentionally Left Blank" on blank pages.

On the first page of the executive summary (or Chapter 1 if there is no executive summary), begin numbering "1" and continue sequential numbering throughout the document. See the Appendices and Attachments section for page numbering of those sections.

Table of Contents

Generate the table of contents should be generated automatically using Microsoft® Word®'s pull-down menu: Insert > Reference > Index and Tables feature. (Appendices or attachments must be added manually.) The table of contents is based on the style headings assigned to each section. Check the table of contents to make sure it has been updated correctly after each series of edits. Checking that chapters and headings agree with the page numbering should be the last task before creating the Adobe® Acrobat® PDF or printing the final master copy for reproduction. See **Figure 8** for an example of a table of contents.

Appendices and Attachments

An appendix is usually supplementary material that is produced by the report's author(s). An attachment is usually supplementary material that is produced by someone other than the author(s). See full discussion in **Chapter 6**.

Copyright and Permissions

If an attachment or an appendix has been previously published, **the author must obtain written permission from the copyright holder before the Energy Commission can put that document on-line.**

You should ask for "written permission for electronic publishing of the document in Adobe® Acrobat® PDF format on the California Energy Commission's website." Make sure there is no time limit on the permission—that is, ensure that the file may be posted on the Energy Commission's website indefinitely.

Send a photocopy of the written permission to the Webmaster when you deliver the report and the appendix(ces) or attachment(s).

Most previously published documents will be posted as separate files, with their own cover pages. No credits page is needed for appendices or attachments not funded by the Energy Commission. On the cover page where the words “Prepared By” are located, please include the following statement:

This document is an attachment to a report funded by the California Energy Commission. The Energy Commission did not fund this document, but the author(s) has/have attached it as a supporting document.

The California Energy Commission wishes to thank the copyright holder, *[fill in name of author and/or publisher or whoever holds copyright]*, for permission to republish this document in electronic format on the Energy Commission's website.

Please contact the original author/publisher for additional information about the document.

Appearance in Table of Contents

When preparing the table of contents for the report, you may need to manually enter each appendix letter and title (or attachment number and title) into the table of contents.

Preparing Appendices

Appendices should use the same Energy Commission-required format and style as the main report. If an appendix was previously published using a different style and format, that organization's or agency's style and format does not necessarily need to be changed. Please contact Media and Public Communications Office for directions on this type of appendix.

The content and format of an appendix is subject to editing just like the report itself.

Appendices are typically included at the end of the main report. They are posted as separate documents if their inclusion in the final report creates a file that is larger than five megabytes. Multiple, short appendices may be combined into one volume.

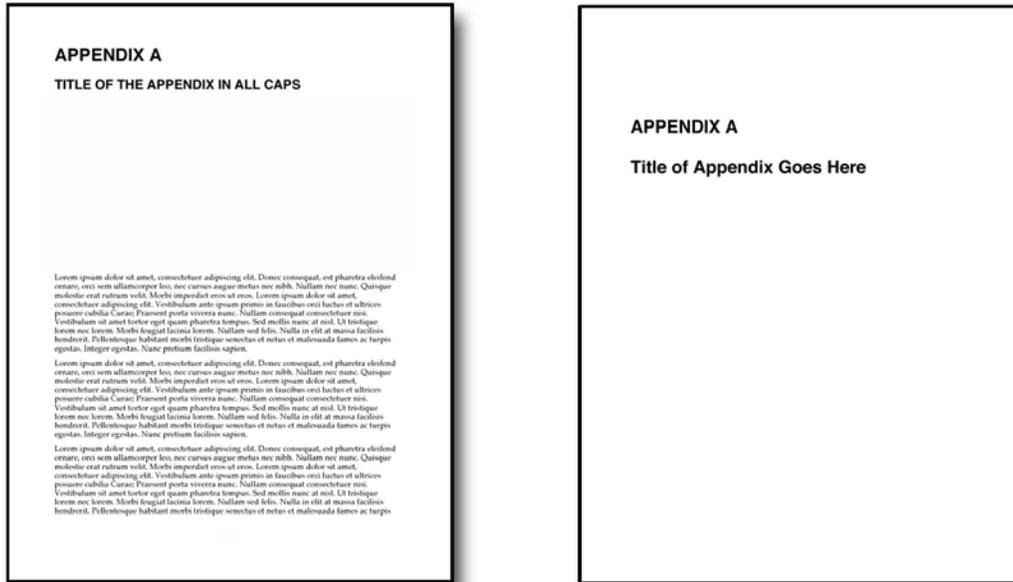
Appendices as Part of the Main Report

If the appendices are short enough, they may be included in the same file as the main report. The first page of each appendix should be a title page, containing the following information:

- The word “Appendix” (with letter A, B, or C, and so forth if more than one appendix), in Arial 24 pt., bold, upper case.
- Title of appendix, in Arial 18 pt., bold, upper or lower case.
- A-1, A-2, A-3, and so forth (or B-1, C-1, and so forth), page numbering centered on the bottom of the page. Use Arabic numerals.

See **Figure 13** for a picture of what two appendix pages could look like.

Figure 6: Examples of Appendix as Part of Main Report



Appendices as Documents Separate from the Main Report

If an appendix is too large (more than 5.0 megabytes), it should be treated as a separate volume from the main report. Where the appendix would normally go in the main report, insert a “slip sheet” that lists the following information:

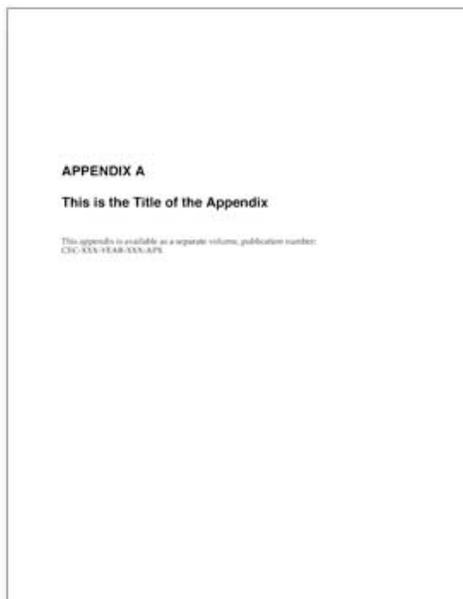
- Appendix A (or B or C, and so forth), in Arial, 24 pt., bold, then two returns.
- Title of appendix, in Title Case, Arial, 22 pt., bold.
- Text on the slip sheet saying: “This appendix is available as a separate volume, publication number CEC-XXX-YEAR-XXX-APX.”
- The slip sheet has no visible page number.

Please see **Figure 13** (on the next page) for an example of a “slip sheet.”

If there is more than one appendix, the titles of each appendix may be listed on a single slip sheet. The title of the page, in that case, should be “Appendices” (Arial 24 pt., bold) with the appendix letters and titles, and their publication number(s), neatly arranged as a list. Please see **Figure 14** (on the next page) for an example of multiple appendices listed on a “slip sheet.”

If you have multiple small appendices, they may be combined into a single volume if the file size permits. If the multiple appendices create a file larger than five megabytes, then separate volumes should be created for each appendix. Appendices are posted on-line in Adobe® Acrobat® PDF format.

Figure 7: Example of a “Slip Sheet” for Appendix A



Each separate appendix must have its own cover page and publication number. If the Energy Commission funded the work, each separate appendix must also have a credits page. The Energy Commission provides the publication number when the report reaches the Media and Public Communications Office for review and sign-offs.

Figure 8: Example of “Slip Sheet” for Multiple Appendices in One Volume



The publication number of an appendix consists of the main report's publication number plus a suffix. If there is only one appendix, the suffix is -AP. If there are multiple appendices, the suffixes are -APA, -APB, -APC, and so forth, depending on the letter of the appendix. Therefore, the publication number for Appendix B of a fictitious report published in 2007 by the Energy Efficiency and Renewables Division would be: CEC-400-2007-987-APB.

If multiple appendices are combined in one volume, then the suffix is only -AP with no additional letter.

If the work contained in the appendix was not funded by the Energy Commission, be sure the cover page contains the boilerplate copyright permission language provided earlier in the "Copyrights and Permissions" section.

Attachments

Attachments are supporting documents that were not written by the author of the main report. They are designated with Roman numerals rather than letters (Attachment I, Attachment II, and so forth).

Attachments are usually published separately from the main report. Prepare a single "slip sheet" and cover page(s) the same way as for appendices. The Energy Commission will assign a publication number to each attachment.

The publication number of an attachment consists of the main report's publication number plus a suffix. If there is only one attachment, the suffix is -AT. If there are multiple appendices, the suffixes are -ATI, -ATII, and so forth, depending on the letter of the attachment. Therefore, the publication number for Attachment II of the same fictitious report published in 2007 by the Energy Efficiency and Renewables Division would be: CEC-400-2007-987-ATII.

In most cases, attachments will require permission to publish from the copyright holder. It is the report author's responsibility to obtain this permission; be sure to include the boilerplate permission language on the cover page. A copy of the written permission should be given to the contract manager to send to the Energy Commission's Webmaster to be filed in the Media and Public Communications Office's copyright approvals filing cabinet.

CHAPTER 8: Formatting Style Matrix for Energy Commission Consultant Reports

The following style types can be found in the report template document’s pull-down Style Menu located on the formatting bar in Microsoft® Word®.

Style Type	Definition	Example
Normal Use for all “regular” text that is not assigned a special style (e.g. heading, bullet, caption, and so forth)	Palatino Linotype 11 pt. Align left Spacing at single line, Space 0 pt before paragraph Space 8 pt after paragraph Palatino is used because of its readability due to its larger “x” height and “m” width. If Palatino is not available, use Century School 11 pt. (second choice) or Times New Roman 12 pt. (last choice).	Palatino Linotype (11 pt.) The quick, fast fox jumped over the lazy brown dog. Century Schoolbook (11 pt.) The quick, fast fox jumped over the lazy brown dog. Times New Roman (12 pt.) The quick, fast fox jumped over the lazy brown dog.
Appendix Text	Same as Normal	The quick, fast fox jumped over the lazy brown dog.
Attachments	The Energy Commission does not require that its style format be used in documents that are attachments.	not applicable
Bullets	Palatino Linotype 11 pt. Space 0 pt. before bullet Space 4 pt. after bullet Indent 0.25" with hanging indent of an additional 0.25" Additional level bullets are each indented another 0.25" with a hanging indent of 0.25".	<ul style="list-style-type: none"> • Bullet item number 1 • Bullet item number 2 <ul style="list-style-type: none"> ○ Item number 2a ○ Item number 2b <ul style="list-style-type: none"> ▪ Sub-bullet to 2b <p>Follow last bullet with two hard returns to separate from next paragraph.</p>

Style Type	Definition	Example
<p>Captions (Below Figures, Graphics, Charts, Drawings, Photographs, and so forth)</p>	<p>Arial 8 pt. Space 4 pt. before paragraph Space 8 pt. after paragraph Center on page (do not wrap text around the picture).</p> <p>Caption should be width of the graphic itself.</p> <p>Brief captions are preferred; however, some graphics may require a lengthier caption. Typically, captions should not introduce new information.</p> <p>Captions for photographs must include an 8 pt. credit line on a separate line (no bold, use a soft return between the caption and the credit) with the individual and/or company's name that supplied the photo.</p> <p>Use a high resolution photograph 150 to 300 dots per inch. Don't use 72 dpi photos taken from websites.</p>	<p style="text-align: center;">Figure 6: BiPV on Carport</p>  <p>Building-integrated solar photovoltaic roofing materials used in a carport by Solar Utility of Culver City, California. Photo Credit: United Solar Systems Corporation</p>
<p>Equations</p>	<p>Use special characters if necessary. Center on new line.</p> <p>Every equation presented must be referred to and explained in the text.</p> <p>If special characters are used to create the equation, make sure typefaces are supported and available across various computer operating systems or platforms. Occasionally, special characters may not be available in a standard typeface. It would be better to create the equation as a graphic in TIF or JPG format and insert it into the text as a graphic file.</p>	$E=mc^2$ CO_2

Style Type	Definition	Example
Figure and Table Titles	<p>Arial Bold 12 pt. Centered above figure or table Space 6 pt. before Space 12 pt. after Text in Title Case</p> <p>Colon after the figure number and before title.</p> <p>Figures and tables can be numbered in a chapter-number format (Figure 2-1, Table 2-2, and so forth), or numbered sequentially throughout the entire report. Be consistent throughout the entire document. Do not mix formats.</p>	<p>Figure 7: This Is the Title Text</p> <p>Note: Text is in title case with no period at the end of the title unless it is a complete sentence.</p> <p>Do not use Word® text boxes.</p>
Figures, Graphs, Charts, Drawings, Photographs	<p>Figures should be centered. Align captions with left edge of figure.</p> <p>Avoid the use of Word® text boxes wherever possible and insert the figures directly into the document.</p> <p>Every figure presented must be referred to in the text.</p> <p>If the figure is a graphic, picture or photograph, it should be at least 300 dots per inch (dpi). Do not use low-resolution Internet pictures (72 to 96 dpi).</p>	<p>For an example, see Figure 1 on page 30.</p>
Footnotes	<p>Palatino Linotype 10 pt. Spacing 0 pt before spacing 6 pt. after</p> <p>Note: the footnote reference number should be superscript in the text but not in the footnote itself.</p>	<p>For an example of Footnotes, see page 56.</p>

Style Type	Definition	Example
Graphs	<p>Do not title a graph while it is being created in separate software, such as Microsoft® Excel®. The Figure Title should label the graphic. The author, however, should strive for clarity.</p> <ul style="list-style-type: none"> • Please label all axes. • Use sentence case. • Include units. • Make sure point size is at least 12 pt. on all labels. 	
Glossary	<p>Use a table with the word, acronym, or abbreviation in the left column and the definition in the right column.</p> <p>Do not show the gridlines of the table.</p> <p>Do not use multiple tabs to “create” a table, but use the table function in Word®.</p>	
<p>Heading 1</p> <p>Chapter Titles</p>	<p>Arial 18 pt. Bold Left aligned Space 12 pt. before Space 12 pt. after</p> <p>No additional return between the title of chapter and the first paragraph.</p> <p>Capitalize the word CHAPTER, followed by a colon, followed by a soft-return, followed by the title in Title Case on the next line.</p> <p>Use line breaks so as to not orphan words all alone on the next line.</p>	<p>CHAPTER 1: This Way to a Better Report</p> <p>See chapter titles throughout this report for other examples.</p>

Style Type	Definition	Example
Heading 2 First Subheading in Chapter Text	Arial 16 pt. Bold Left aligned Space 6 pt. before Space 12 pt. after Should be an extra hard return between the ending of previous paragraph and the new subheading.	This is Heading 2, a Subheading
Heading 3 Sub-subheading	Arial 14 pt. Italic Left aligned Space 0 pt. before Space 3 pt. after	<i>This is Heading 3, a Sub-subheading</i>
Heading 4 Sub-sub-subheading	Arial 12 pt. No bold Left Aligned Space 3 pt. before Space 3 pt. after	This is Heading 4, a Sub-sub-subheading
NOTE THERE ARE NO ADDITIONAL SMALLER HEADINGS! DO NOT CREATE NEW ONES!		
Page Numbers	Palatino Linotype 10 pt. Centered Bottom of page	See bottom of this page for an example.
References - Bibliography	Normal style 0.5" Hanging Indent	This is an example of a reference that goes into a second line. The hanging indent approximates the end of the last name.
Table Column Headings and Table Data Cells	Arial Columns Heads - Bold Data cells - No Bold	
Title for following sections: Acknowledgments, Preface, Table of Contents, Abstract, and Executive Summary	Arial Bold 14 pt. Space 0 pt. before Space 12 pt. after Note: use a soft return to break the title into neat and easier to understand segments. Capitalize the words at the start of each new line.	This is the Title Style For the Sections Mentioned on the Left

CHAPTER 9: Submitting Reports to the Energy Commission

Most companies use the Microsoft® Office® suite of software programs for word processing, spreadsheets, and presentations. The Energy Commission requests that report files be compatible with Microsoft® products. This request, however, does not mean that the Energy Commission or the State of California endorse these products. Other word processing software programs may be used as long as the saved files are compatible with Microsoft® Word® XP™. Please do not provide Word® 2007/2008 format, which uses extensible markup language. The file type is .docx instead of the normal .doc.

When submitting reports to the Energy Commission, please send all files relating to the document, including original files used to create figures, charts, or graphs. That way, the Energy Commission will be able to replicate the document in the future or convert it into future publication formats as technology changes. If you've questions about sending files to the Commission please contact your contract manager of the Commission's Webmaster (916.654.4989).

Word® Files

Send copies of the cover page, credits page, and full documents as Microsoft® Word® .doc files. These may be combined into one file or sent as separate files. Appendices should be sent as .doc files as well.

When saving the file, please make sure that the copy has all tracked changes accepted into the final version, unless it is undergoing further editing.

Do not password protect or encrypt the documents or files.

Document Properties

The properties of the file must be filled out in Word®. Go to File > Properties menu and complete the information in the Summary portion. These include:

- Title
- Subject
- Author
- Manager
- Company
- Category (optional)
- Keywords
- Comments (optional)
- Graphic Files and Photographs

File names should be descriptive of the report. So, when the Word® file is sent to the Energy Commission, it can be named anything as long as it is descriptive. The file name for the Word® and PDF files will eventually use the publication number of the report or appendix. For example, the PDF file for this *Style Manual* is CEC-180-2008-002.PDF when the report is posted online.

Graphics and Figures

Contractors need to send a copy of all of the graphic files in the report along with the final document file. These files should be sent to the contract, grant, or work authorization manager and eventually to the Energy Commission's Webmaster on a CD-ROM or DVD.

The following are things to remember regarding graphics, photographs and images of figures.

- Embed the graphic in the report document, but also save each file separately from the main report.
- Save pictures/photos in either Photoshop PSD (please include layers if used), TIF, or JPG formats.
- Graphics and photographs should be saved at a higher resolution, at least 300 dots per inch (dpi). Do not use lower-resolution (72 or 96 dpi) graphics that are found on websites, as they do not reproduce well in printed documents.
- Label graphic file names so they correspond with their figure title in the report. For example, if you have a photograph used as Figure 23, label the file name as figure_23.jpg.
- Use underscores (_) between words in file names instead of spaces.
- Do not use the following characters in a file name: ! @ # \$ % ^ & * () ; { } [] / \ |

Please note that Energy Commission publications are in the public domain because they are funded by public money. As such, photographs or other graphic files also are in the public domain. The Energy Commission reserves the right to use photographs or other graphic files in other publications or on the Energy Commission's website.

Accessibility of Energy Commission Documents

The California Energy Commission's websites must comply with American with Disabilities Act regulations. These include Section 508 of the Federal Rehabilitation Act of 1973, as amended (29 U.S.C. 794d); California Government Code Section 11135 (d) (1-3); and State Administrative Manual (SAM) Chapters 4800-4833.

Because of that requirement, all PDF files will need to have informational tags embedded within the document to alert screen readers about elements of the document. This includes having images tagged, paragraphs ordered for screen readers (especially if using two-column design), and other elements.

Please visit the Adobe Corporation's website on accessibility for information about making sure that the elements in PDF files are properly tagged and encoded at:

<http://www.adobe.com/accessibility/index.html>

CHAPTER 10: Use of the California Energy Commission Seal

The California Energy Commission seal may not be used without permission.

The seal is used by the Energy Commission to indicate official information and/or official Commission publications. If it is used by other entities, it could be construed as an endorsement of a product or process, and the Commission and the State of California cannot provide such endorsements. The seal should also not appear on any website other than ones hosted and maintained by the Commission.

The Energy Commission is aware of statements in marketing literature stating or implying Commission “approval” of products or services. The Energy Commission does not endorse, favor, or recommend any particular product or service. Moreover, California law states that:

“It is unlawful for any person, firm, corporation, or association that is a nongovernmental entity to... solicit the purchase of or payment for a product or service...by means of a mailing, electronic message, or Internet website that contains a seal, insignia, trade or brand name, or any other term or symbol that reasonably could be interpreted or construed as implying any state or local government connection, approval, or endorsement....”

California Business and Professions Code, Section 17533.6.

Occasionally, the Energy Commission’s seal is used on websites, banners, or posters for workshops, meetings, or conferences where the Commission is a sponsor or co-sponsor. Or there may be another reason for the Commission seal to appear on project-related items. Those uses require approval by the Energy Commission’s Media and Public Communications Office **before** a product is created. Draft versions of such documents will need to go through the approval/review and sign-off process.

If you have a question about the use of the Energy Commission seal, please contact the Media and Public Communications Office at 916-654-4989.

APPENDIX A: Acronyms and Definitions Used By Energy Commission Contracts Office

Acronyms

A&E	Architectural & Engineering
ADA	Americans with Disabilities Act
CCC	California Civil Code
CCM	Commission Contract Manager
CCR	California Code of Regulations
CEQA	California Environmental Quality Act
CMAS	California Multiple Award Schedule
CO	Contracts Officer
CON	Contract Opportunity Notice
CSCR	California State Contracts Register
DGS	Department of General Services
DOF	Department of Finance
DVBE	Disabled Veteran Business Enterprise
GC	California Government Code
IA	Interagency Agreement
IFB	Invitation for Bids
IT	Information Technology
MM	Management Memo
MOU	Memorandum of Understanding
MSA	Master Services Agreement
NCB	Non-Competitive Bid
OLS	Office of Legal Services, DGS
OSDC	Office of Small/DVBE Certification
PCC	Public Contract Code
PD	Procurement Division
PON	Program Opportunity Notice
RFP	Request for Proposals
RFQ	Request for Qualifications
RFQ	Request for Quotations
SAM	State Administrative Manual
SB	Small Business
SBDVBE	Small Business Disabled Veteran Business Enterprise Program
SCM	State Contracting Manual
SOW	Scope of Work
2CCR	Title 2, California Code of Regulations

Definitions

ADVANCE PAYMENT - Any payment made to a contractor before work has been performed or goods have been delivered. Advance payments are permitted only if authorized by statute. (For example, interagency agreements may provide for advance payments under GC, Section 11257).

AGREEMENT - A contract.

AMENDMENT - A formal modification or change of a material term, such as the term, cost, or scope of work, in one or more provisions of an existing contract.

ASSIGNMENT - Transfer of contractual rights from one person to another.

BID - A potential contractor's reply to a solicitation for purchase of goods or services which represents what the contractor would charge to provide those goods or services.

BIDDER - An individual, sole proprietorship, firm, partnership, corporation, or any other business venture that responds to an Invitation for Bids or Request for Proposals by submitting a bid. A potential contractor.

BOARD RESOLUTION - A formal decision by the governing body of a public agency, often required to authorize the purchase of goods or services, or to authorize a contract for services.

BREACH OF CONTRACT - Failure, without legal reason, to comply with the terms of a contract.

CALIFORNIA STATE CONTRACTS REGISTER - The state publication, now electronic, containing advertisements for contract solicitations and a list of contracts for which exemptions from bidding have been approved.

CERTIFIED SMALL OR MICRO-BUSINESS - A business that has been certified by the Small Business and DVBE Certification Program, Department of General Services, as a small or micro-business defined in GC, Section 14837 and 2CCR, Section 1896. The OSDC issues the business a letter of certification that allows the business to claim the small business preference when submitting bids or proposals and to obtain statutory penalties for late payments on contracts. (SCM 8).

CIRCUMVENTION - The act of avoiding the effect or intent, going around, defeating by ingenuity or strategy, or nullifying the purpose, (as in circumvention of competitiveness).

CMAS CONTRACT - A contract awarded using the California Multiple Award Schedule.

COMMERCIALLY USEFUL FUNCTION - Any time a subcontract is awarded to a certified Small Business or Micro Business for Small Business Preference, or Disabled Veteran Business Enterprise (DVBE) for goal participation, that subcontractor(s) must be providing goods or services that contribute to the fulfillment of the contract requirements by performing a commercially useful function. A certified small or micro business or DVBE is deemed to perform a commercially useful function if it does all of the following:

1. Is responsible for the execution of a distinct element of the work of the contract.
2. Carries out its obligation by actually performing, managing, or supervising the work involved.

3. Performs work that is normal for its business services and functions.
4. Is not further subcontracting a portion of the work that is greater than that expected to be subcontracted by normal industry practices.

A contractor, subcontractor, or supplier will not be considered to perform a commercially useful function if the contractor's, subcontractor's, or supplier's role is limited to that of an extra participant in a transaction, contract, or project through which funds are passed in order to obtain the appearance of small, micro business or DVBE participation.

COMMODITIES - Goods, including such tangible items as movable or personal property, as opposed to services.

COMPETITIVE BIDDING - A purchasing process in which the opportunity to make offers to supply goods or services is not limited to any one bidder. All bidders are evaluated on the same fixed criteria.

CONSIDERATION - Something of value that induces a person to enter into a contract. The consideration may include some right, interest, profit, or benefit obtained by one party, or some forbearance, detriment, loss, or responsibility assumed by the other party.

CONSULTING SERVICES CONTRACT - A contract for services of an advisory nature, which provides a recommended course of action or personal expertise. The definition does not include A&E contracts (PCC 10335.5; SCM 3).

CONTRACT - A legally binding agreement between the state and another entity, public or private, for the provision of goods or services.

CONTRACT MANAGER - A staff person designated by the Commission to manage performance under a contract. No staff member of the Commission may act as a Contract Manager until they have become certified by taking the contract management training given by the Contracts Office.

CONTRACTOR IDENTIFICATION NUMBER - The number assigned to the contractor for tax purposes. This may be the contractor's social security number, or the federal identification number. Contract Managers are responsible for obtaining this number from the contractor and providing it on the form CEC-26 in a contract request package.

COOPERATIVE AGREEMENTS - A special agreement with the federal government in which there is a general public benefit, as opposed to a specific benefit accruing only to the contracting federal agency.

CORPORATION - A fictional entity, created by or under the authority of the laws of a state, which has the legal authority to engage in certain activities.

DEFAULT/BREACH - Failure to perform an obligation in a contract.

DIRECT COST - Any cost that can be specifically identified as generated by and in accordance with the provisions or activity requirements of the contract.

DISABLED VETERAN BUSINESS ENTERPRISE - A business that meets the criteria set up by the Military and Veterans Code, Section 999(g).

ENCUMBRANCE - A commitment of funds guaranteeing a source of payment for a specific transaction.

ENCUMBRANCE DATE - Date that funds have to be allocated to a contract, grant, or purchase order by.

Generally, there is one year to encumber the funds from the beginning of the fiscal year.

ENTERPRISE ZONE ACT - (GC, Sections 7080 et seq.) Provides preferences for state contracting opportunities in designated enterprise zones.

EVALUATION COMMITTEE - A committee or panel of three or more that convenes to evaluate the qualifications of bidders who respond to RFPs or RFQs.

EXECUTION OF A CONTRACT - The act of signing a contract, which provides a legal basis for required performance by parties to the contract.

EXECUTIVE ORDER - A directive issued by the Governor that establishes binding policy for government agencies covered therein.

EXEMPTION - A formal waiver by DGS, of DGS responsibilities required by statute, regulation, or policy, or a delegation of such responsibilities by DGS to a state agency. Some common exemptions awarded by DGS involve contract approval, advertising, and competitive bidding requirements.

GENERAL PROVISIONS - Terms and conditions that apply to all contracts for services and are included in any final document.

GOOD FAITH EFFORT - A sincere effort to meet the legal steps made by a bidder or potential contractor to meet DVBE goals as defined in PCC, Section 10115.2(b) and the implementing regulations.

HEARING - A formal proceeding, customarily public, in which evidence is presented and issues of fact or law are adjudicated.

INCOME/REVENUE CONTRACT - A contract in which the Commission is receiving money in exchange for services provided.

INDEMNIFICATION - Contractual provision in which one party will reimburse the other party for settlements or judgments on claims arising from the contract.

INDIRECT COST RATES/OVERHEAD - An amount or pro rata share of existing salaries and benefits, rent, equipment, materials, and utilities attributable to a function or activity but not necessarily generated by the function or activity.

IN-KIND SERVICES - Services performed in exchange for other services in lieu of money.

INTERAGENCY AGREEMENT - An agreement between two or more state agencies (GC, Sections 11256-11263; SCM 3.03).

INVITATION FOR BIDS (IFB) - A type of solicitation document, used in a formal competitive bidding process, which contains a precise statement and complete specification of what the Commission is attempting to purchase. Qualifying bidders compete solely on the basis of cost.

JOINT POWERS AGENCY - An agency formed by agreement of two or more public agencies. Under this agreement, the joint powers authority may exercise any power common to the contracting parties (GC, Section 6502).

LEGAL SERVICES CONTRACT - Any contract for services rendered by an attorney. Legal services contracts are exempt from advertising or solicitation.

LIQUIDATION DATE - Date that all funds must be paid out, or expended. Generally, there are two years to liquidate the funds after encumbrance.

LOCAL AGENCY MILITARY RECOVERY AREA ACT (LAMBRA) - Provides preference for state contracting opportunities in designated local agency military base areas.

MASTER SERVICES AGREEMENT (MSA) - An agreement entered into by the Department of General Services or another state agency for use by other state agencies that wish to use the same services. It may also be an agreement by a state agency for use by divisions of that agency (SCM 3.4).

MEMORANDUM OF UNDERSTANDING (MOU) - A contract between two entities, usually a signed agreement with no cost involved.

MICRO-BUSINESS - See Certified Small Business.

NON-COMPETITIVE BID (NCB) - This term replaces sole source. A situation in which only a single business enterprise is afforded the opportunity to offer the State a price for the specified goods or services.

PRE-BID CONFERENCE - A meeting with potential bidders before the proposal submission date of a solicitation.

PRIMARY RFP - The two-envelope method for evaluating proposals in which qualifications and cost proposals are submitted in two separate sealed envelopes. Qualifications are first evaluated according to criteria set in the RFP. For Bidders who meet the minimum qualifications standards, the scoring team then evaluates the cost proposals. The award is made to the lowest bidder meeting the minimum qualifications, if that bidder is deemed to be commercially useful.

PROGRESS PAYMENTS - Partial payments related to steps or phases toward the completion of the required services under a contract.

PROMPT PAYMENT ACT - Statutory provisions that set interest penalties on late payments for state contracts (GC, Sections 926.15, 926.17).

PROPRIETARY SOFTWARE - Software that is owned and copyrighted by the contractor who in turn sells licenses for the use of this product.

PROTEST - A formal challenge by a bidder to the intended award of a contract via solicitation.

PUBLIC ENTITY - A county, city, district, local public body, state board, state commission, federal agency, or joint powers authority.

RESOLUTION - A formal decision by the governing body of a public agency, often required to authorize the purchase of goods or services.

RESPONSIBLE BIDDER - A bidder who is fully capable of performing the contract. When there is documented evidence that a bidder is not financially qualified or is otherwise unable to perform the required services, the bidder may be deemed not responsible and the bid may be rejected by the awarding agency. The bidder may then protest the intended award of the contract and is entitled to a hearing.

RESPONSIVE BIDDER - A bidder whose bid meets the specifications and other requirements contained in an RFP or RFQ.

SECONDARY RFP - The method for evaluating proposals obtained through the RFP in which an evaluation panel assesses each proposal according to a set of criteria, of which one must be the cost. Each criterion is assigned a weight, with substantial weight going to cost. The award is made to the bidder whose proposal is given the highest score.

TARGET AREA CONTRACT PREFERENCE ACT (TACPA) - TACPA (GC, Section 4530 et seq.) provides preferences for contracting opportunities in distressed areas.