



**CALIFORNIA
ENERGY COMMISSION**



California Energy Commission

STAFF REPORT

Style Manual: Fourth Edition

**Used for California Energy Commission Staff,
Lead Commissioner, and Commission Reports,
Presentations, and Papers**

**Gavin Newsom, Governor
March 2020 | CEC-180-2020-001**

California Energy Commission

Susanne Garfield-Jones

Lana McAllister

Carol E. Robinson

Primary Authors

Carol E. Robinson

Project Manager

Lindsay Buckley

**Director of Communications and
External Affairs**

MEDIA AND PUBLIC COMMUNICATIONS OFFICE

Drew Bohan

Executive Director

DISCLAIMER

Staff members of the California Energy Commission prepared this report. As such, it does not necessarily represent the views of the CEC, its employees, or the State of California. The CEC, 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 CEC nor has the Commission passed upon the accuracy or adequacy of the information in this report.

ACKNOWLEDGEMENTS

The California Energy Commission Media and Public Communications Office thanks the following present and former colleagues who laid the groundwork for the 2020 edition:

Bob Aldrich, Webmaster emeritus

Michael Wilson, graphics director emeritus

Margaret (Meg) Larkin, former graphic designer

Albert Lundeen

Amanda Poletti

Kevin Kidd

PREFACE

The fourth edition of the California Energy Commission Style Manual supersedes the 2015 version. It is intended to assist California Energy Commission (CEC) staff and others who prepare CEC reports.

“Reports” for this style manual include staff papers, staff reports, Lead Commissioner reports, Commission reports, consultant reports, guidelines, manuals, and project reports for the Energy Research and Development Division and the Clean Transportation Program of the Fuels and Transportation Division.

This manual is on the CEC [website](http://www.energy.ca.gov) at <http://www.energy.ca.gov>. The manual and report templates for use with Microsoft Word® are on the CEC’s EnergyNet Intranet [website](http://energynet/Exec/doc_production/index.html) at http://energynet/Exec/doc_production/index.html.

If you have any questions about the information provided in this manual, please contact the Media and Public Communications Office (MPCO) at (916) 654-4989.

ABSTRACT

The fourth edition of the Commission Style Manual helps staff members, contractors, and project researchers write clear and concise reports and papers for the California Energy Commission (CEC). This manual helps ensure that those reports and papers incorporate CEC-approved style.

This edition includes a new chapter on making documents accessible to readers with disabilities. As of July 1, 2019, each director or secretary of a state agency must post on the agency website a signed California Department of Technology Website Accessibility Certification form or the agency's own form confirming that the website complies with state law and the Web Content Accessibility Guidelines 2.0.

The word usage chapter in the 2015 editing has been eliminated. Staff members may consult the EnergyNet intranet "Document Production and Notices" pages for word usage, as well as Section 11 of *The Gregg Reference Manual: Tribute (Eleventh) Edition* by William A. Sabin.

This document, based upon *The Gregg Reference Manual* and the [EIA Writing Style Guide, April 2015](#), is available online with links from the CEC "EnergyNet" intranet website and at the [California Energy Commission main website](#), www.energy.ca.gov. Microsoft Word® files for the document templates, covers, and credits pages can be downloaded from those pages as well.

The Media and Public Communications Office may revise this document as necessary. Please check for the [latest version](#) at http://energynet/Exec/doc_production/index.html.

Keywords: Plain language, acronyms, formatting, usage, accessibility

Please use the following citation for this report:

Garfield-Jones, Susanne, Lana McAllister, and Carol E. Robinson. 2020. *Style Manual: Fourth Edition*. California Energy Commission. Publication Number: CEC-180-2020-XXX.

TABLE OF CONTENTS

ACKNOWLEDGEMENTS.....	i
PREFACE	ii
ABSTRACT.....	iii
TABLE OF CONTENTS	v
LIST OF FIGURES	vii
LIST OF TABLES	viii
EXECUTIVE SUMMARY	1
Plain Language.....	2
Preparing Energy Commission Reports.....	2
CHAPTER 1: What This Manual Is About.....	3
Introduction.....	3
Why Should You Use This Style Manual?.....	3
Updates to the Style Manual	4
Major Updates Since Last Edition.....	4
CHAPTER 2: Report Contents, Formatting, and Styles	5
Report Templates.....	5
Blank Pages	6
Figures, Graphs, and Tables.....	6
Report Contents.....	7
Use of Colors in Graphs and Figures, Size of Fonts, and Other Graphic Elements.....	8
Footnotes	8
Page Breaks.....	8
Pagination	9
Table of Contents, Lists of Figures and Tables	9
Report Formatting Styles	9
CHAPTER 3: Publication Steps for Papers, Reports, and Presentations.....	20
Reports and Papers	20
Change in Publication Review.....	20
Report Sequencing	22
Errata and Additional Revisions to Reports.....	23
Reproduction	24
CHAPTER 4: Parts, Contents, and General Formatting of Reports.....	25
Report Sections.....	25
Cover and Credits Pages for Energy Commission Reports.....	26
Covers	26

Report Credits Page.....	26
Other Types of Commission Reports.....	28
Publication Numbers.....	29
Suffixes at End of Publication Numbers.....	29
Other Report Sections.....	29
Acknowledgements Page (Optional).....	29
Preface Page (Optional).....	30
Abstract, Keywords, and Citation Page (Mandatory).....	30
Table of Contents.....	32
Executive Summary.....	33
Chapters and Section Headings.....	34
References.....	35
Glossary.....	35
Bibliography.....	35
CHAPTER 5: Appendices and Attachments.....	36
Important Note About Copyrights and Permissions.....	36
Appendices.....	36
Formatting and Editing of Appendices.....	37
Appendices Publication Numbers.....	37
Page Numbering of Appendices.....	37
Appendices as Part of the Main Report.....	38
Appendices as Documents Separate From the Main Report.....	39
Appearance in Table of Contents.....	40
Attachments.....	40
CHAPTER 6: Document Accessibility for Energy Commission Reports.....	42
What Is Document Accessibility?.....	42
Seven Principles to Creating an Accessible Word Document.....	42
Step One: Font Style and Size.....	43
Step Two: Appropriate Use of Color.....	43
Step Three: Add Alternative Texts and Captions.....	47
Step Four: Construct Simple Tables.....	49
Step Five: Use Meaningful Hyperlink Text.....	51
Step Six: Use Built-In Formatting Styles.....	52
Step Seven: Check Accessibility.....	52
Roles and Responsibilities.....	53
Document Accessibility Resources.....	53
CHAPTER 7: Preparing Accurate, Consistent Reports and Report Content Styles.....	54
Writing Style.....	55
Acronyms and Abbreviations.....	56
Bulleted Lists.....	59
Rules for Bullets.....	59
Format for Bulleted Lists.....	60

Capitalization	60
Adjective Phrases and Adverbs.....	61
Compound Adjectives	61
Internet and Email Addresses	62
Italics	62
Language of Report.....	62
Legislation (Referencing Legislation in Energy Commission Documents)	62
Numbers.....	63
Page Breaks.....	64
Percentages.....	64
Punctuation	64
Brackets	64
Colon and Semicolon	65
Commas	65
Commas in Dates	65
Hyphen (-), En Dash (–), Em Dash (—).....	65
Period Spacing	66
Quotation Marks (“”)......	66
Special Characters and Symbols.....	66
Underlining.....	66
CHAPTER 8: Footnotes and References in the Text	67
References Within the Report Body	67
Footnote Citations	67
CHAPTER 9: Submitting Files to the Media and Public Communications Office.....	68
Word and PDF Files.....	68
Document Properties	68
Graphics and Figures.....	69
COMMON EDITOR/PROOFREADING MARKS.....	70

LIST OF FIGURES

Figure 1: Low-Resolution Graphic Downloaded From Internet.....	6
Figure 2: Example of a Graphic Properly Used in a Report	7
Figure 3: Example of Abstract/Keyword/Citation Page	30
Figure 4: Example of Table of Contents	33
Figure 5: Example of Appendix as Part of Main Report	38
Figure 6: Example of a "Slip Sheet" for Appendices	40
Figure 7: Colour Contrast Analyzer	44
Figure 8: Incorrect Contrast Pie Chart Example.....	46
Figure 9: Final Pie Chart	47

Figure 10: Format Picture	48
Figure 11: Describing Graphic Using Alt Text	49
Figure 12: Table Properties.....	50

LIST OF TABLES

Table 1: Summary of Formatting Styles for Energy Commission Reports.....	10
Table 2: Formatting Style Matrix for Energy Commission Reports.....	11
Table 3: Author and Project Manager Review Steps	20
Table 4: Commissionwide Review Process Steps	21
Table 5: CEC Publishing Steps	22
Table 6: Example of Use of Color and Nonredundant Symbols	46
Table 7: Common and Acceptable Acronyms and Abbreviations	57

EXECUTIVE SUMMARY

The fourth edition of the California Energy Commission's (CEC) Style Manual assists staff writers in producing consistent-looking documents in plain language.

For this edition, the style manual addresses document compliance with [Web Content Accessibility Guidelines 2.0](#). These guidelines help make Web content, including reports using Microsoft Word® and Adobe Acrobat®, accessible to a wider range of people with disabilities, including those with blindness and low vision. As of July 1, 2019, all report templates comply with these guidelines, and the CEC mandates that report writers use these templates.

Other changes include the following:

- The new cover has the CEC logo on the top-left corner and the Natural Resources Agency logo in the top-right corner.
- The margins on each side and on the bottom of each report template page have been reduced to allow more text on the page, thus reducing the amount of paper used.
- The authors expanded the "Citation Information" subsection to include information on citing articles, reports, journals, books, and Web pages.
- The list of acronyms in the chapter "Preparing Consistent, Accurate Reports and Report Content Styles" has expanded. These acronyms can be used on subsequent references in the abstract and executive summary of a CEC report
- In the "Glossary" subsection, the manual writers request that not only an acronym be spelled out, but defined.
- The chapters "Energy Commission Presentations"; "Required Elements for Fact Sheets, Brochures, Posters, and Other Types of Printed Materials"; "Submitting Files to the Media and Public Communications Office"; and "Use of the California Energy Commission Seal" have been deleted. Information from these chapters is available on EnergyNet, the Commission's intranet site available only to Commission staff. The information can be found by clicking the icon "Document Production and Notices."
- The chapter on "Word Use and Misuse" from the previous edition of the style manual has been eliminated for this version. CEC staff may find these entries under the "Document Production and Notices" icon on EnergyNet. For more information on usage, check *The Gregg Reference Manual, Tribute (Eleventh) Edition* by William A. Sabin and *To the Point: A Dictionary of Concise Writing* by Robert Hartwell Fiske.
- The California Energy Commission encourages the acronym "CEC" in its documents.

The bases for this style manual are *The Gregg Reference Manual* and the [EIA Writing Style Guide](#). Any issues not covered in this style manual may be found in these references. Other resources used for this style manual edition include the *Merriam-Webster Dictionary*; *The Chicago Manual of Style, 16th Edition*; *To the Point*; and *The Elements of Style* by William Strunk Jr. and E. B. White.

Plain Language

The CEC strongly endorses the use of plain language in its documents. Plain language is mandated by the California and U.S. governments. According to the [U.S. government](#) at PlainLanguage.gov, plain language can be understood the first time it is read or heard. Plain language uses short sentences, the active voice, everyday words, and logical organization. It helps readers find what is needed quickly. Hence, the government's business is readily accessible to the public.

Preparing Energy Commission Reports

Staff members preparing a report for the CEC should consult this style manual. The "Document Production and Notices" link on the CEC's EnergyNet intranet page has resources including report templates that can help writers prepare documents. Staff members who have additional questions may contact CEC Chief Editor Carol Robinson of the Media and Public Communications Office at (916) 654-4989.

CHAPTER 1:

What This Manual Is About

Hard writing makes easy reading.

— Wallace Stegner

Introduction

The CEC produces hundreds of presentations, reports, brochures, and other printed items each year. These publications¹ are used to convey information, printed and sent to libraries, and placed on the [CEC website](http://www.energy.ca.gov) (<http://www.energy.ca.gov>).

CEC management believes that all documents need to have a consistent design; be grammatically consistent, clear, and concise; and have an instant identity with other materials the CEC has prepared.

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

CEC Media and Public Communications Office staff understands that you need to know what is expected to produce a quality publication. This style manual clarifies publication style conventions, including the approval process and formatting of publications. One chapter is devoted to writing, including strategies for organizing a document.

The CEC does not intend to create a grammar text. Rather, staff wants to address the items that seem most vexing. For a complete and comprehensive source, the CEC recommends using *The Gregg Reference Manual*.

Why Should You Use This Style Manual?

By using this style manual, you will ensure that CEC documents look consistent and communicate well.

There are legal grounds for “good writing.” California Government Code Section 6219 states:

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,

¹ The terms “publications” and “documents” are used interchangeably throughout this manual to refer to CEC reports, papers, brochures, flyers, handouts, presentations, and all other types of printed and delivered materials.

announcement, regulation, manual, memorandum, or any other written communication that is necessary to carry out the agency responsibilities under the law.

Updates to the Style Manual

The style manual is a working document. Media and Public Communications Office (MPCO) staff will regularly review this manual and incorporate any necessary changes into future editions.

Major Updates Since Last Edition

There have been changes throughout the style manual correcting errors and mistakes. The following are the main updates since the previous edition.

- The new cover has the CEC logo on the top-left corner and the Natural Resources Agency logo in the top-right corner. The MPCO Editing Unit prepared this style manual using one of several report templates that ensure the content is accessible to readers with disabilities.
- The margins on the sides and the bottom of each report template page have been reduced to allow more text on the page, thus reducing the amount of paper used.
- The list of acronyms in the chapter "Preparing Consistent, Accurate Reports and Report Content Styles" has expanded. These acronyms can be used on subsequent references in the abstract and executive summary of a CEC report
- In the "Glossary" subsection, MPCO requests that an acronym be not only spelled out, but defined.
- The chapters "Word Use and Misuse"; "Energy Commission Presentations"; "Required Elements for Fact Sheets, Brochures, Posters, and Other Types of Printed Materials"; "Submitting Files to the Media and Public Communications Office"; and "Use of the California Energy Commission Seal" have been deleted. Information from these chapters is available on EnergyNet, the CEC's intranet site available only to CEC staff. The information can be found by clicking the icon "Document Production and Notices."
- This style manual includes a chapter on document accessibility for impaired readers. The chapter outlines instructions on checking a report for accessibility compliance with the Americans with Disabilities Act.
- The abstract should be on an odd-numbered, right-hand-facing page.

CHAPTER 2:

Report Contents, Formatting, and Styles

All California Energy Commission (CEC) reports contain the following sections, in the following order:

- Cover page (**required**)
- Credits page on the reverse side of cover (**required**) with legal disclaimer (**mandatory on committee, staff, consultant, and research and development and Clean Transportation Program project reports**)
- Acknowledgements page (optional)
- Preface (optional)
- Abstract, keywords, and citation page (**required**)
- Table of Contents (**required**, followed by List of Figures and List of Tables, if needed)
- Executive Summary (optional but **required on policy and project documents**)
- Body of the report
- References (if applicable)
- Glossary/Acronyms (If more than 10 acronyms or abbreviations are used, it is **required**. Definitions are also **required**.)
- Bibliography (if applicable)
- Appendices (if applicable) (Create a separate volume if very large.)
- Attachments (if applicable)

Later chapters discuss report contents and parts.

Report Templates

Prepare the report using one of the CEC-approved templates. The templates are Americans with Disabilities Act (ADA) accessible. Use the report typographic styles described in this manual. They are summarized in **Table 1: Formatting Style Matrix for Reports**. The style template—and boilerplate cover and credits page templates—are on the CEC EnergyNet intranet website under the icon [“Document Production and Notices.”](#) **Do not deviate from the report template.**

All CEC computers should be set up to have the Commission style formats as the default in Microsoft Word. All other styles can be stripped from Word formatting palette. If a report has been written elsewhere, it may need to be reformatted using the CEC style.

For formatting help, please see the [step-by-step instructions](#) on EnergyNet at

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

Blank Pages

Insert blank pages after the following pages so that the next section begins on the right-hand side.

- Following single-page acknowledgement page if there is no preface
- Following table of contents, list of figures, and list of tables
- Following executive summary (if used)

Place the disclaimer page for a staff paper behind the cover. The credits page for other reports is on the backside of the cover. Please make sure the abstract is on an odd-numbered, right-hand-facing page. Do not put blank pages at the end of chapters so that next chapter begins on the right side. Only Chapter 1 needs to be on an odd-numbered, right-hand-facing page.

Figures, Graphs, and Tables

Figures, graphs, and tables (graphics) should be clear and readable. Source lines are **required** on all figures and graphs.

The graphic should be introduced in the paragraph before and explained fully. The explanation of the graphic may be used as alternative (alt) text for document accessibility. Do not download and use low-resolution graphics from the Internet, such as in **Figure 1**. While these may appear fine on your computer monitor, when printed, the picture may look blurry.

Figure 1: Low-Resolution Graphic Downloaded From Internet



Example of logo downloaded from the CEC website and enlarged for effect. Graphics or photos used on the internet are typically done as 72 or 96 dots per inch (dpi) graphics files. Most reports are printed at 300 dpi. Therefore, the graphic will appear very blurry when printed.

Source: California Energy Commission, Media and Public Communications Office

Writers should provide alternative text for the graphic. In the document, go to the "File" tab. Under "Info," select "Check for Issues," then select "Check Accessibility."

The title or label of graphic should be typed in as part of the report and not 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 Titles" style in Tahoma, 12 pt., bold, centered similar to the example in **Figure 1**. The figure title should be in title case, be centered, and have no

more than two lines. Fonts used within figures, graphs, and tables should be sans serif, which work best as screens with low resolution make serif fonts like Lucida Bright more difficult to perceive.

Captions or sources listed below a graphic should use the style specified in the formatting matrix (Tahoma bold 10 pt. for captions below the graphic, Tahoma normal 10 pt. for source lines). 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 generated automatically in a manner similar to the table of contents. If a figure or table title is particularly long, manually edit it in the list of figures/list of tables as you see fit.

Original graphics files must be submitted with your report. If a chart or graph was created in Excel, then that Excel file should also be submitted with the report.

Report Contents

CEC staff and contractors must use the report typographic styles described in this manual. They are summarized later in **Table 1: Formatting Style Matrix for Reports**. The style template—and boilerplate cover and credits page templates—are on the ["EnergyNet" intranet website](http://energynet/Exec/doc_production/index.html) at http://energynet/Exec/doc_production/index.html and on the [Energy Commission website](http://www.energy.ca.gov) at <http://www.energy.ca.gov>. (Commission contract managers may send the report template to the contractors.)

Figure 2: Example of a Graphic Properly Used in a Report



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

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

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

Often the CEC's reports are photocopied 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 for future readers because a chart may be photocopied from a photocopy. Information must be clear and easy to understand; numbers should be large and clear enough to be read easily.

Moreover, graphics may need to be reduced 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. Graphics or figures should be created at a minimum of 300 dpi.

Footnotes

Use footnotes (not endnotes) in CEC 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.

Because Tahoma 10 pt. in superscript is too small to read in the text, use 12 pt. in superscript. The footnote number is part of the Quick Style Gallery in Microsoft Word®, and the CEC style is reflected in the report templates. Occasionally, the writer will have to increase the footnote number font size in the text manually to 12 pt.

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

Do not use footnotes in report or chapter titles, and do not footnote headings, subheadings, or graphics titles. Moreover, please do not use footnotes in the preface, abstract, or executive summary.

Footnote numbers are superscript in the text but not in the footnote itself.

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 depending on the computer operating system. Including a page break will ensure that headings are not left

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 in Tahoma 12 pt., 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.

alone at the bottom of a page with no content. Furthermore, insert a page break to ensure the content of a graphic is on one page.

Pagination

Use Tahoma 12 pt. for page numbers, centered at the bottom of each page.

Pagination begins on the acknowledgements or preface page (as a Roman numeral – i, ii, iii ...) and continues in lowercase Roman numerals through the abstract, table of contents, and lists of figures and tables (if used). 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 in Arabic numerals (1, 2, 3...) and continue sequential numbering throughout the document. See **Chapter 5** for numbering appendices pages.

Table of Contents, Lists of Figures and Tables

The table of contents should be generated automatically using Microsoft Word 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.

Report Formatting Styles

The following is a summation of the styles used in all CEC reports. Exceptions to this summary include the final *Integrated Energy Policy Report* and other specialized reports. Those exceptions **must be cleared through the director of communications and external affairs** in advance of the design and layout.

The CEC uses Tahoma, a highly readable sans serif that meets the needs of the new report format, advances document accessibility, and works with any version of Microsoft Word® on PCs and Apple Macintosh® computers.

Table 1: Summary of Formatting Styles for Energy Commission Reports


Style Type	Definition
Body (Normal) Text	Tahoma 12 pt., leading over 15 pt. leading, with 7 pt. spacing at the end of the paragraph, align left.
Bullets (regular and numbered)	Tahoma 10 pt., 0.2-in. hanging indent
Acknowledgments, Preface, Abstract, Table of Contents, List of Tables of Figure Heading (Section Title)	Tahoma 17 pt., leading over 15 pt., BOLD, CENTERED, ALL CAPS
Heading 1 (Document Title)	Tahoma 29 pt., Bold, Aligned Left
Heading 2 (Chapter Title)	Tahoma 20 pt., Bold, Aligned Left
Heading 3 (Subheading)	Tahoma 15 pt., Bold Over 15 Pt. Leading, Aligned Left
Heading 4 (Sub-subheading. Please use as sub-subheading for executive summary.)	Tahoma 13 pt., Bold Over 15 Pt. Leading, Aligned Left
Heading 5 (Sub-sub-subheading.)	Tahoma 12 pt., Bold Over 15 Pt. Leading, Aligned Left
Heading 6 (Sub-sub-sub-subheading. Use sparingly.)	Tahoma 12 pt., Italics, leading over 15 pt. aligned left
Figure and Table Titles	Tahoma 12 pt., Bold, Centered
Caption Text	Tahoma, 10 pt., bold, align margins with figure margins.
Credits for Photos and Source Information	Tahoma, 10 pt., normal Credit: Text Goes Here.

Source: California Energy Commission, Media and Public Communications Office

The following formatting style matrix provides a more comprehensive description of the approved style formats.

Table 2: Formatting Style Matrix for Energy Commission Reports

Style Type	Definition	Example
<p>Normal</p> <p>Use for all “regular” text that is not assigned a special style (for example, heading, bullet, caption, and so forth)</p>	<p>Tahoma 12 pt. Line spacing 15 pt. Align left Space 0 pt. before paragraph Space 7 pt. after paragraph</p>	<p>Tahoma (12 pt.) The quick, fast fox jumped over the lazy, brown dog.</p>
<p>Appendix Text</p>	<p>Same as Normal</p>	<p>The quick, fast fox jumped over the lazy, brown dog.</p>
<p>Attachments</p>	<p>The CEC does not require that its style format be used in documents that are attachments.</p>	<p>Not applicable</p>
<p>Body Text</p>	<p>See “Normal” above</p>	
<p>Bullets</p>	<p>Tahoma 12 pt. Space 0 pt. before bullet Space 0 pt. after bullet Text Indent 0.2" Additional level bullets are each indented another 0.2"</p>	<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"> ▪ Subbullet to 2b <p>Follow last bullet with two hard returns to separate from next paragraph.</p>

<p>Captions</p>	<p>Tahoma bold, 10 pt.</p> <p>Align left; indent to align with image</p> <p>Space 6 pt. before paragraph; space 7 pt. after paragraph.</p> <p>Caption should be the width of the graphic. Brief captions are preferred; however, some graphics may require a lengthier caption. Typically, captions should not introduce new information. Please use only high-resolution photographs of 150 to 300 dpi. Do not use 72 dpi photos or graphics “borrowed” from websites. A source line is required on all graphics, including graphs, photos, and tables.</p>	<p>Figure 3: BiPV on Carport</p>  <p>Building-integrated solar photovoltaic roofing materials used in a carport by Solar Utility of Culver City, California.</p> <p>Photo Credit: United Solar Systems Corporation</p>
<p>Credits for Photos and Source Information</p>	<p>Tahoma normal 10 pt., align margins with table margins</p>	

<p>Equations</p>	<p>Use special characters if necessary.</p> <p>Center on a new line.</p> <p>Every equation presented must be referred to and explained in the text.</p> <p>You can use Equation Editor in Microsoft Word to create the equation.</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.</p>	<p>$E=mc^2$</p> <p>CO₂</p>
------------------	--	--

<p>Figure and Table Titles</p>	<p>Arial bold, 12 pt. Align center. Space 12 pt. before paragraph; space 0 pt. after paragraph. Text in Figure Title case. Colon after the figure/table number and before title. Figures and tables can be numbered in a chapter number format (Figure 2-1, Table 2-3, and so forth) or numbered sequentially throughout the entire report. Be consistent through the entire document. Do not mix formats.</p>	<p>Figure XX: This Is an Example Note: Title is in title case with no period at the end of the title unless it is a complete sentence.</p>
<p>Figures, Graphs, Charts, Drawings, Photographs</p>	<p>Figures should be centered. Align captions with left edge of figure. Avoid the use of Word text boxes wherever possible and insert the figures directly into the document. Every figure presented must</p>	<p>For an example, see Figure 1 on page 12.</p>

	<p>be referred to in the text.</p> <p>If the figure is a graphic, picture or photograph, it should be at least 300 dpi. Do not use low-resolution Internet pictures (72 to 96 dpi).</p> <p>Use colors in graphics that provide enough contrast. (See chapter on "Document Accessibility.")</p>	
Footnotes	<p>Tahoma normal 10 pt.</p> <p>Align left.</p> <p>Space 0 pt. before paragraph, space 5 pt. after paragraph.</p> <p>Footnote numbers in the text are Tahoma normal 12 pt. in superscript.</p> <p>Footnote numbers are superscript in the text but not in the footnote itself.</p>	For an example of a footnote, see page 7.
Graphs	Do not title a graph while it is being created in separate	

	<p>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. <p>Make sure point size is at least 14 pt. on all labels.</p>	
Glossary	<p>Use a table with the word and acronym or abbreviation in the left column, and the definition in the right column.</p> <p>Do not show the gridlines of the table. Do not use multiple tabs to “create” a table but use the Word table function.</p>	<p>Greenhouse gas (GHG)—Any gas that absorbs infrared radiation in the atmosphere.</p>
Heading 1	<p>Tahoma, bold, 29 pt.</p> <p>Align left</p> <p>Space 54 pt. before paragraph, space 7 pt. after paragraph.</p>	<p>Style Manual: Fourth Edition</p>

		This Is Heading 1
Heading 2	<p>Tahoma, bold, 20 pt., title case</p> <p>Align left</p> <p>Space 0 pt. before paragraph, space 24 pt. after paragraph.</p> <p>Page break before paragraph.</p> <p>½ pt. border below text, <i>not underlined.</i></p> <p>Lucida Bright, bold, 14 pt.</p> <p>Line spacing 15 pt.</p> <p>Align left.</p> <p>Space 12 pt. before paragraph, space 2 pt. after paragraph</p>	<p>CHAPTER 1:</p> <hr/> <p>This Is Heading 2</p>
Heading 3	<p>Lucida Bright bold 15 pt.</p> <p>Line spacing 15 pt.</p> <p>Align left.</p> <p>Space 12 pt. before paragraph, space 2 pt. after paragraph</p>	This Is Heading 3

Heading 4	<p>Lucida Bright bold 13 pt.</p> <p>Line spacing 15 pt.</p> <p>Align left</p> <p>Space 10 pt. before paragraph, space 2 pt. after paragraph</p>	This Is Heading 4
Heading 5	<p>Tahoma bold, 12 pt.</p> <p>Line spacing 15 pt.</p> <p>Space 10 pt. before paragraph, space 2 pt. after paragraph</p>	This Is Heading 5
Heading 6	<p>Tahoma italic, 12 pt.</p> <p>Line spacing 15 pt.</p> <p>Align left.</p> <p>Space 0 pt. before paragraph, space 2 pt. after paragraph</p>	<i>This Is Heading 6, to be used sparingly!</i>
Page Numbers	<p>Tahoma 12 pt. Centered Bottom of page</p>	See bottom of this page for an example.
References – Bibliography	<p>Normal style 0.25" Hanging Indent</p>	This is an example of a reference that goes into a second line. The hanging indent approximates the end of the first last name.

<p>Table Column Headings and Table Data Cells</p>	<p>Arial or Tahoma Columns Heads – Bold Data cells – No Bold</p> <p>Size depends on amount of data in cell. Do not crowd cells.</p>	
<p>Title for following sections: Acknowledgements, Preface, Table of Contents, Abstract, and Executive Summary</p>	<p>Tahoma Bold 17 pt. All uppercase Centered</p> <p>Space 0 pt. before Space 12 pt. after</p> <p>Note: Use a soft return to break the title into neat and easier-to-understand segments.</p>	<p>This Is the Title Style For the Sections Mentioned on the Left</p> <p>PREFACE</p>

Source: California Energy Commission, Media and Public Communications Office

CHAPTER 3: Publication Steps for Papers, Reports, and Presentations

Reports and Papers

Before beginning, you should understand how the CEC publication process works. Publishing a report or paper with the CEC should not be all consuming. It essentially breaks down into three areas (See Table 3 below.):

- 1) **Steps 1 through 7** are generally prereview.
- 2) **Steps 8 through 20** reflect the general steps for document review.
- 3) **Steps 21 through 26** involve publishing a report and distributing final master copies.

Review this style manual at the beginning of the writing process and follow the format and styles in your CEC reports.

CEC staff should use the latest version of the [Publication Approval Form \(CEC 5 Form\)](http://energynet/Exec/doc_production/templates/) available on the Commission "EnergyNet" intranet at http://energynet/Exec/doc_production/templates/.

Change in Publication Review

To streamline publication review, the Editing Unit in the Media and Public Communications Office edits the report once instead of twice, as it had previously. After the Editing Unit review, the document goes to the director of the division that composed the report. The revised CEC 5 Form reflects the change. The following tables outline the CEC's report review and publication steps.

Table 3: Author and Project Manager Review Steps

Step Number	Review Step
1	Author plans and conceptualizes the report and determines the target audience and scope.
2	Author outlines and plans chapters and sections. Author may enlist assistance of the MPCO Editing Unit when outlining and planning the report.
3	Author writes draft of report.
4	Author edits draft of report, adds cover and credits pages, creates table of contents, formats report using the CEC style template, and checks for accessibility in Microsoft Word.
5	Author sends draft of report to office manager (and peers) for first review.

Step Number	Review Step
6	Office manager adds comments and suggestions. (Note: Report will probably go between the author and the manager or colleagues several times before finalized into a product to send out for review.)
7	Author incorporates edits and comments into report.

Table 4: Commissionwide Review Process Steps

Step Number	Review Step
8	Author prepares CEC 5 Form to accompany report on sign-off route.
9	Author sends report electronically to office manager for review and sign-off.
10	Office manager sends report electronically and delivers folder containing the CEC 5 Form to MPCO for review and sign-off, respectively.
11	After review for formatting, content, and ADA compliance, MPCO returns report electronically to author to incorporate edits. Author or designate retrieves the folder with the signed CEC Form 5.
12	After incorporating edits, author sends report to division director for review.
13	After review, division director sends report to Office of Governmental Affairs (OGA) for review. (Note: only if legislatively mandated document. If not, division director sends report to the lead commissioner.)
14	Division director or OGA sends report to lead commissioner for review and sign-off.

Table 5: CEC Publishing Steps

Step Number	Publishing Step
21	Author sends Word, PDF, graphics, and other files to Webmaster for posting on CEC website and archiving.
22	Web Team: <ol style="list-style-type: none"> a. Assigns publication number to document. b. Checks Americans with Disabilities Act accessibility of document. c. Checks document properties. d. Adds report information to publications database. e. Codes final report HTML page for website, creates links from various pages to report. f. 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 each month on a CD-ROM.
24	Publications Unit prints master paper copy and prints limited number of inventory copies.
25	Publications Unit sends printed copies to state depository libraries.
26	Webmaster archives electronic version(s) of publication to be kept indefinitely.

Report Sequencing

Occasionally reports go through several steps or versions. They can move through the following steps, or they can start at step 3 and go to step 8:

1. Draft Consultant Report CEC-100-2020-001-DCR
2. Final Consultant Report CEC-100-2020-001-FCR
3. Staff Draft Report CEC-100-2020-001-SD
4. Staff Final Report CEC-100-2020-001-SF
5. Committee Draft Report CEC-100-2020-001-CTD
6. Committee Final Report CEC-100-2020-001-CTF
7. Commission Draft Report CEC-100-2020-001-CMD
8. Commission Final or Adopted Report CEC-100-2020-001-CMF
9. Revised Commission Final Report CEC-100-2020-001-CMF-REV

Each type of report is considered a separate report for review and sign-off.

A report is not called "draft" when it is sent around for review. It is called a "draft" only if it is going to be published as a draft and a final report will be subsequently published. Furthermore, do not use the "DRAFT" watermark on CEC documents.

Moreover, reports may also be revised and republished. In this instance, the MPCO will use the same publication number with a "-REV" suffix added. The publication date on the cover should say "Revised: Month Date, Year." For example, if a final CEC-adopted report were to be revised, the number stack on the cover would read:

CEC-100-2020-001-CMF-REV
Revised: April 27, 2020

The publication number assigned to a report in the above sequence remains the same throughout the entire sequence. The suffix added to the end of the publication number is changed at each step. The suffix is added when the report reaches MPCO for review and sign-off. Examples are given above.

If the report is part of such a sequence, please attach a note to the CEC 5 Form to inform MPCO of that fact so that a new publication number is not assigned in error.

Project reports from the Fuel and Transportation Division's Clean Transportation Program (CTP) often have addenda. To denote an addendum to a project report, the publication number may read, for example, "CEC-600-2020-001-AD1."

Errata and Additional Revisions to Reports

Occasionally, a report needs small corrections because of typographical errors, or revisions are made after the report is published.

If the errors are relatively minor, an errata sheet can be issued. The changes are physically made in the Word file of the document, a new PDF is created, and the publication number receives the suffix -ER[1]. (Use numbers if more than one erratum.) The MPCO also adds a PDF of the errata sheet to the original document so that original document contains the errata sheet as part of the PDF.

If the report has major revisions, then the suffix -REV is added. Use -REV2, -REV3, and so forth if more than one revision.

Reproduction

The CEC has additional procedures, beyond the review and publication process, for mass reproduction of documents. A total of 500 impressions or fewer (10 copies of 50 pages for example) may be duplicated using an office or division photocopier. For amounts greater than 500 impressions, a reproduction order (Commission Form CEC-219) must be made with the Reprographic Unit in Business Services. Find more about [Reproduction Services](#) on EnergyNet at <http://energynet.energy.state.ca.us/Admin/hrssb/Business%20Service/CopyCenter.html>.

CHAPTER 4:

Parts, Contents, and General Formatting of Reports

Report Sections

As explained in Chapter 2, CEC reports contain the following sections, in the following order:

- Cover page (**required**)
- Credits page (**required**) with legal disclaimer (**mandatory on committee and staff reports**) on the reverse side of cover
- Acknowledgements page (acknowledgements are optional)
- Preface (optional)
- Abstract, keywords, and citation page (**required**)
- Table of contents (required, followed by list of figures and list of tables, if needed)
- Executive summary (optional but required on policy documents)
- Body of the report
- References (if applicable)
- Glossary/acronyms (If more than 10 acronyms or abbreviations are used, it is required. Term definitions are also required.)
- Bibliography (if applicable)
- Appendices (if applicable) (Create a separate volume if very large.)
- Attachments (if applicable)

This chapter will describe each report part, showing examples and explaining the processes involved in creating those sections.

The three main Commission-authored reports—staff reports (including manuals), Lead Commissioner reports, and Commission reports—have the same cover but different credits pages. The credits pages of consultant and Energy Research and Development Division (ERDD) and CTP project reports also differ. Staff papers do not have a credits page.

Cover and Credits Pages for Energy Commission Reports

Covers and credit pages for CEC reports use templates that are available from the [Energy Commission "EnergyNet" Intranet website](#) at

http://energynet/Exec/doc_production/.

Report templates are also available at the [CEC's website](#), <http://www.energy.ca.gov>.

If you wish to create a report using a cover or font other than those sanctioned by the CEC, contact the director of communications and external affairs for an exception.

Covers

Do not put a page number on the cover.

The required elements used on these covers are the:

- CEC logo in the top left corner and the logo of the California Natural Resources Agency in the top right corner.
- Title of the report.
- Subtitle of report. (If not used, remove subtitle.)
- Type of report (Staff, Lead Commissioner, Commission Draft/Final Report)
- Governor's name and title.
- Month and year published.
- Publication number.

Titles concisely describe the report. Titles are in title case in Tahoma 29 pt., bold. Subheadings are in Tahoma 16 pt., normal, in gray.

Do not use abbreviations or acronyms in the titles of reports. Spell them out. For example, if the report is about Assembly Bill 32, do not use "AB 32" in the report title.

Report Credits Page

Commission Report Credits Page

The credits page of Commission reports is different from those of other reports in that there is no disclaimer on Commission reports. Commission reports also use the full commissioners' names, referred to as a "stack."

The credits page is on the reverse side of the cover of the report. There is no blank page between the cover and credits pages. The credits are on the left-hand side of the page.

The credits page of Commission and Commission-adopted reports requires the following parts all in Tahoma typeface:

- Commission name in title case, 20 pt., bold
- Commissioners stack in 12 pt. normal, which includes:

- Name of the chair.
- Chair title below name in bold, followed by an additional return.
- Vice chair name.
- Vice chair title below name in bold, followed by additional return.
- The word "Commissioners" in bold.
- Listing of the other three commissioners by seniority rank.
- Two line returns
- Executive director name with title "Executive Director" below name in bold and title case
- Name of primary author(s) with words "Primary Author(s)" below name in bold and title case. (If there are more than five authors, do not stack the names. Instead, put names with commas between but use only one half of the page width.)
- Name of project manager (if applicable) with words "Project Manager" below in bold.
- Name of office manager, with the title "Manager" in title case below, followed by name of office in bold and ALL CAPS below.
- Name of division chief, followed by title "Deputy Director" in bold and title case below, followed by division name in bold and ALL CAPS.

The credits page should be only one column long. If more space is required, please contact MPCO for direction.

Do not put a page number on the cover.

Reminder: **Always** double-check the spelling of all names and titles!

Commissioner Stack for Other Printed Materials

A similar Commissioner stack is required on all brochures, posters, and other printed materials the CEC produces (either in-house or externally) or that are produced under contract for the Commission. Those documents also require the governor's name and the CEC logo.

Lead Commissioner Report Credits Page

A Lead Commissioner report uses the same cover as Commission report. Lead Commissioner report covers also are used for the presiding member proposed decision (PMPD) for power plant licensing cases, usually with an artist rendition of what the power plant will look like on the cover.

Staff Report Credits Page

The cover for CEC staff reports has the words "Staff Report" in the place where the type of report is placed. Covers and credit pages for Energy Commission staff reports use templates that are available from the [CEC "EnergyNet" intranet](http://energynet.intranet) website at

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

Consultant Reports Cover and Credits Pages

The CEC occasionally hires outside contractors to help prepare various reports and other printed materials.

The [consultant report template](https://www.energy.ca.gov/contracts/consultant_reports/index.html) is on the CEC website at https://www.energy.ca.gov/contracts/consultant_reports/index.html.

Research and Development and Clean Transportation Program Project Reports

Authors of ERDD and CTP project reports may use scientific numbering in the report headings, as long as the heading numbers are consistent.

Although these reports may address science and technology, contractors write in a manner understood by a lay audience. Furthermore, the executive summary belongs to the lay reader (ratepayer, legislator, nonscientific executive, and so forth). Authors must write this section clearly and concisely with little or no jargon.

Other Types of Commission Reports

Other reports that the Commission publishes include draft and final versions (if applicable) of the following:

- Guidebooks (staff, Lead Commissioner, Commission, draft, and final, where applicable)
- Instructions (staff, Lead Commissioner, Commission, draft, and final, where applicable)
- Manuals (staff, Lead Commissioner, Commission, draft, and final, where applicable)
- Preliminary and final staff analysis or assessments (of power plant licensing cases)
- Presiding member proposed decisions (of power plant licensing cases)
- Regulations (including 15-day, 45-day, 60-day language, and final)

These reports (and other types not mentioned here) use the standard Commission report cover template. Change the “type” of report on the front cover to the applicable type. Use the appropriate credits page with disclaimer (if non-Commission-adopted).

Regulations, decisions, manuals, and guidebooks are publications that do not get the high-level of editing and review as do regular CEC reports. **They still must go through review and sign-off using a CEC 5 Form.** Commission editors, however, know that the language of these publications is exact and must be left (in many cases) as it is written. That does not mean that writers should be careless in punctuation, grammar, and spelling. These documents should follow the formatting and content standards set forth in this Commission Style Manual.

The only exception to the sign-off process and the need for a CEC 5 Form are power plant siting case reports. These are the preliminary and final staff assessments (PSAs and FSAs, respectively), the presiding member proposed decisions (PMPDs), and CEC final decisions. Siting Division office managers, the siting division chief, Office of the Chief Counsel, and the Hearing Office (where applicable) review and edit these reports. Usually they are not edited or reviewed by MPCO or the Executive Office.

Publication Numbers

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

The format for publication numbers corresponds to American National Standard (ANS) Z39.23-1997 for formatting and creating standard report numbers for technical reports.

The format for publication numbers is:

CEC – XXX – YEAR – XXX – suffix – format id.

The parts of the publication number are:

- The Commission identification with the ANS.
- The division, office, or program area number for which the report was 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, -FS for fact sheet, -CD, -DVD).

A hyphen is used between each part.

The Web Team assigns the publication number for each document before posting to the CEC website.

Suffixes at End of Publication Numbers

The MPCO adds suffixes 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 hyphen.

Other Report Sections

Acknowledgements Page (Optional)

This page comes after the credits page and precedes the preface page. Page numbering begins on this page with lowercase Roman numerals (i, ii, iii, iv, v, and so forth).

What Are Acknowledgements?

Acknowledgements express appreciation by the authors or committee members to those who participated in the gathering of information for or the writing of the report. It may be a paragraph, bulleted list, or columns of names and, if appropriate, their affiliations. Acknowledgements are optional.

Preface Page (Optional)

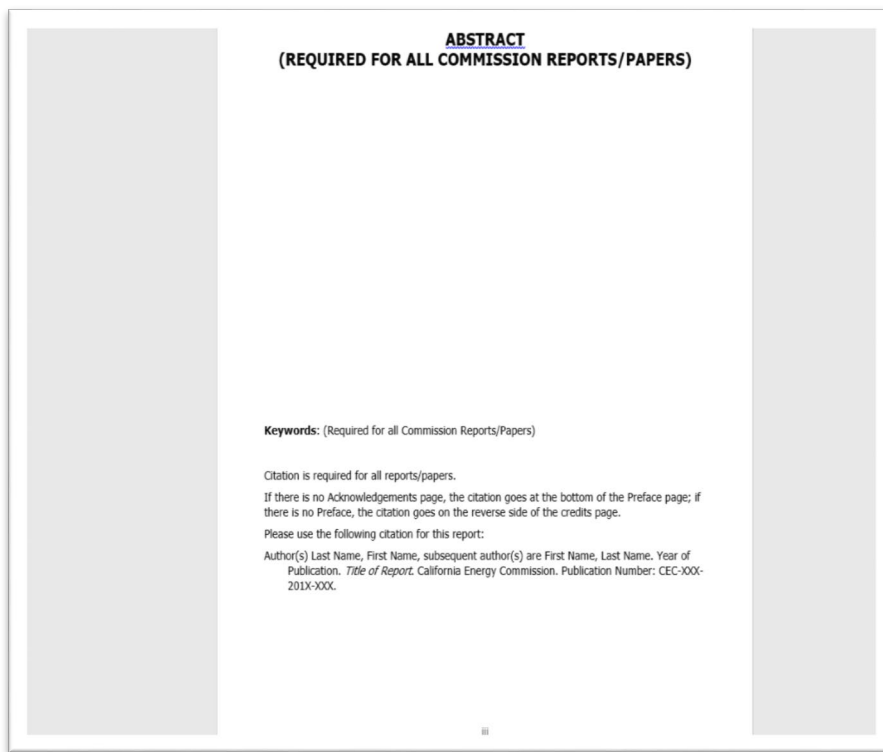
This page comes after the credits page and acknowledgements (if used) and precedes the abstract page. Page numbering begins on this page with lowercase Roman numerals (i, ii, iii, iv, v, vi, etc.) if it did not begin on the acknowledgements page.

The preface is an introduction to the report generally explaining the subject, scope, or aim. If the report is legally or legislatively required, the preface states the law or mandate that dictates that the report be completed.

Abstract, Keywords, and Citation Page (Mandatory)

The abstract, keywords, and citation have been gathered together on one page—the abstract page. Below is an example.

Figure 3: Example of Abstract/Keyword/Citation Page



Source: California Energy Commission, Media and Public Communications Office

Abstract

All CEC reports are required to have a short abstract. This concise, informative summary of the report should be no more than 300 words, single-spaced.

The abstract should clearly address the report purpose, scope, methods, and major findings, including the report 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 purpose. Do not include citations within the abstract.

Place the abstract on an odd-numbered, right-hand-facing page.

Keywords

The abstract page must contain five or more keywords that will help search engines and other databases find the report subject matter. The keywords should be listed separately and spaced about five lines below the end of the abstract. Separate each word by comma—followed by a space—with no ending punctuation. For example:

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

Citation Information

Citations are now included in the abstract page.

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 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 (as publisher)
- CEC publication number

Citation Example:

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

Additional Examples:

Aldrich, Bob, Susanne Garfield-Jones, Margaret Larkin, Lana McAllister, Carol Robinson, and Michael Wilson. 2015. *Style Manual: Third Edition: Used for California Energy Commission Staff, Lead Commissioner, and Commission Reports, Presentations, and Papers*. California Energy Commission, Media and Public Communications Office. Publication Number: CEC-180-2015-002.

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

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

Table of Contents

Include the following sections in the table of contents:

- Acknowledgement (optional)
- Preface (optional)
- Abstract, keywords, and citation (required)
- Executive summary (required in all consultant reports and policy reports)
- Chapter number and title followed by subheadings using the following format:

Chapter 1: Chapter Title in Title Case (Heading 2)

○ Subheading (Heading 3)

▪ Sub-subheading (Heading 4)

- Sub-sub-subheading (Heading 5)

- 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 the Microsoft Word 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.

Following the table of contents, generate the list of figures and the list of tables, if needed, using Word 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. (The Microsoft Word automatic table of contents feature, while useful, is not perfect and can occasionally miscreate entries.) The appendix and attachment listings must be entered by hand. Do not provide page numbers for appendices or attachments.

The table of contents should use a right-hand tab, set at 6.5 inches, 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 4: Example of Table of Contents

	Page
SB 350 Doubling Energy Savings by 2030 Methodology Report	i
Acknowledgements	i
Abstract	ii
Table of Contents	iii
List of Figures.....	viii
List of Tables.....	viii
Executive Summary	10
CHAPTER 1: Introduction	14
Savings Accounting	15
Utility Programs	16
Beyond Utility Programs	17
Codes and Standards	17
Financing Programs.....	18
Behavior and Market Transformation	18
Sector/Other.....	18
CHAPTER 2: SB 350 Savings Calculation Methodology	21
SB 350 Tool Objectives.....	21
Utility Savings Workbooks.....	23
Beyond Utility Program Inputs	23
Beyond Utility Program Workbooks.....	24
Post-Processing	24
CHAPTER 3: Disadvantaged Communities and Low Income	25
Definitions of DACs	25
Definition of LI.....	26
Dataset Reviews	27
Applicability of CES	28
Methodology Description	35
CHAPTER 4: Utility Program Savings – Investor-Owned Utilities	41
Methodology Description: Historical Savings.....	41
Methodology Description: Future Savings.....	41
Forecasting Scenarios: Future Savings.....	42
CHAPTER 5: Utility Program Savings – Publicly-Owned Utilities	45
Methodology Description: Historical Savings.....	45

Source: California Energy Commission, Media and Public Communications Office

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 or Recommendations or both

These subheadings 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. Assume a nontechnical, management-level readership.

The introduction summarizes the purpose of the report. An introduction should give the relevant background and overview. It should define the issue or problem being addressed by the report. If the author uses jargon, the jargon must be defined at a lay reader’s level.

As a report summary, the executive summary should not present new information not found in the main document. The executive summary should not just repeat the abstract.

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

The executive summary heading uses the same "ALL CAPS" 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 shift-return (soft return), and then the chapter title in title case.

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

You do not need to capitalize the following words, unless they begin the title or a second line:

a an and by for or the

Example:

CHAPTER 1: How You Should Create Excellent Titles for Commission Reports

The example above is awkward because it orphans the word "Reports." Break the line (with shift>return) to group common words together:

Good:

CHAPTER 1:
How You Should Create Excellent Titles
For Commission Reports

Better:

CHAPTER 1:
How You Should Create
Excellent Titles for Commission Reports

Best:

CHAPTER 1:
Creating Excellent Titles for Commission Reports

The example marked "Better" uses a stepped format that is more pleasing to the eye, but the example marked "Best" is cleaner and reads better.

Chapter 1 should begin on an odd-numbered page. Subsequent chapters may begin on either an odd- or even-numbered page. Chapter headings go at the top of the page.

Only ERDD and CTP project reports may use scientific or technical section numbering (Section 1.1, Section 2.1.6). If scientific numbering is used, it must be used for all headings throughout the report, not just the first heading.

References

The references section at the end of the report must list all documents cited in the body of the report. List references in a standard alphabetical format. Use the section title font for "References" and the Tahoma 12 pt. regular text font for each citation. Please check that references contained in the report body are accurate and that the full citation for each reference is listed in the references section.

Titles of reports, books, and periodicals are in italics. Titles of chapters, articles, fact sheets, brochures, and Web pages are enclosed in quotation marks without italics.

Please provide the year after the name of the authors and, if available, organization that produced the document. If the month is available, provide that as well. Please hyperlink the title of the article or report, followed by the deactivated URL.

Examples:

Melaina, Marc, Ethan Warner, Yongling Sun, Emily Newes, and Adam Ragatz (National Renewable Energy Laboratory). 2014. *Program Benefits Guidance: Analysis of Benefits Associated With Projects and Technologies Supported by the Alternative and Renewable Fuel and Vehicle Technology Program*. CEC-600-2014-005-D. Available at <http://www.energy.ca.gov/2014publications/CEC-600-2014-005/CEC-600-2014-005-D.pdf>.

California Energy Commission staff. *2017 Integrated Energy Policy Report*. February 2018. Publication Number: CEC-100-2017-001-CMF. Available at <https://efiling.energy.ca.gov/getdocument.aspx?tn=223205>.

See "Citation Information" subsection on page 33 of this style manual for more examples.

Glossary

To help readers understand Commission reports, provide a glossary with a definition for each term, acronym or abbreviation, or both. Use the Microsoft Word table feature to create a two-column format with the acronym or abbreviation and the spelled-out term in the left column and the definition in the right column. Designate a header row with "Term" in one column and "Definition" in the other.

Bibliography

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

CHAPTER 5:

Appendices and Attachments

An appendix is usually supplementary material produced by the report author. An attachment is usually supplementary material produced by someone other than the author.

Important Note About Copyrights and Permissions

If an attachment or an appendix has been previously published, the author **must obtain written permission** from the copyright holder before the CEC can republish or put that document online.

You should ask for “written permission for electronic publishing of the document in Adobe Acrobat PDF format on the CEC website.”

Most previously published documents will be posted as separate files with the respective cover pages. No credits page is needed for an appendix or attachment not funded by the CEC. On the cover page where the words “Prepared by” are, please include the following statement:

Please note: This document is an attachment to a report prepared/funded by the California Energy Commission (CEC). The CEC did not prepare or fund this attachment, but the author(s) has/have requested it be available as a supporting document.

The CEC wishes to thank the copyright holder, *[fill in name of author or publisher or whomever holds the copyright or a combination]*, for permission to republish this document in electronic format on the CEC website.

Please contact the original author/publisher for additional information about the document at *[fill in company website address, phone number, or email address]*.

Appendices

An appendix is supplementary material usually produced by the report 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 appendix. References in the main report to information contained in the appendix should 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 matter, the appendix probably should be dropped.

Formatting and Editing of Appendices

Appendices should use the same CEC-required formatting and style as the main report. If an appendix was previously published using a different style and format, that organization or other agency style and format does not necessarily need to be changed. Please contact MPCO for directions on appendices that were previously written.

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

If small enough, appendices will usually be a part of the actual report. An appendix cover page should appear like what appears in **Figure 5** on the next page.

Each appendix must have a cover page and publication number. If the CEC funded the work, each appendix must also have a credits page. The Web Team provides the publication number before the report is posted online

If the appendix has been previously published by another organization or agency with a different cover, it receives a CEC cover page but no credits page. If the work contained in the appendix was not funded by the CEC, be sure the cover page contains the boilerplate copyright permission language provided earlier in the "Copyrights and Permissions" section.

Appendices Publication Numbers

The publication number of an appendix consists of the main report 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 2020 by the Efficiency Division would be CEC-400-2020-987-APB.

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

Page Numbering of Appendices

Page numbering of appendices should include the letter of the appendix followed a hyphen and then by the page number. The same conventions of page numbering used in regular reports is also used in appendices.

Example of page numbering: A-1, A-2, A-3; B-1, B-2, B-3; and so forth.

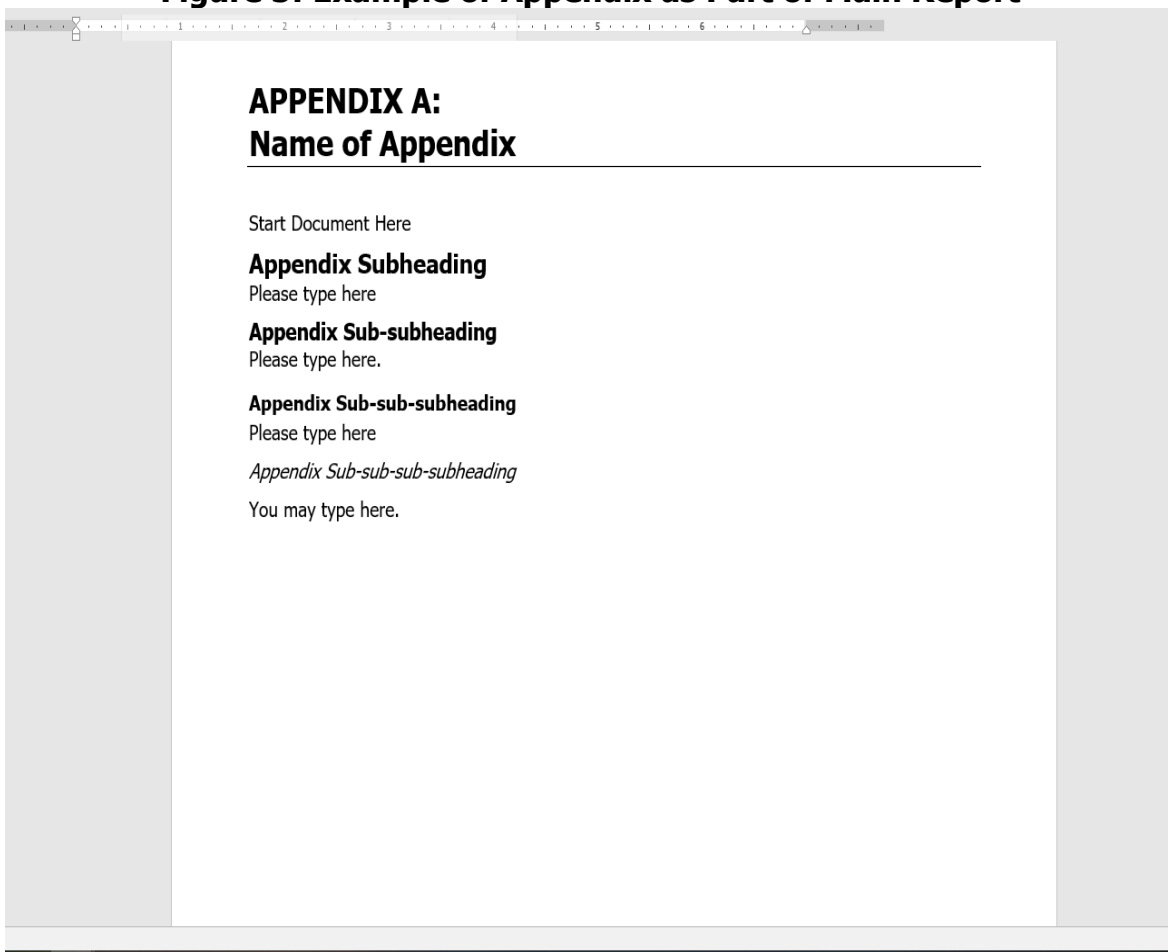
Appendices as Part of the Main Report

If the appendices are short enough, they may be included in the same Word 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 on if more than one appendix) in Tahoma 20 pt., bold, upper case.
- Title of appendix, in Tahoma 20 pt., bold, title case. Use a soft return for the following line.
- A-1, A-2, A-3, and so on (or B-1, C-1, and so on), page numbering centered on the bottom of the page. Use Arabic numerals.

Figure 5 shows the format of what appendix title page could look like.

Figure 5: Example of Appendix as Part of Main Report



Source: Microsoft Word 2016

Appendices as Documents Separate From the Main Report

If the Word file created by an appendix is too large (more than 5.0 megabytes), treat it 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:

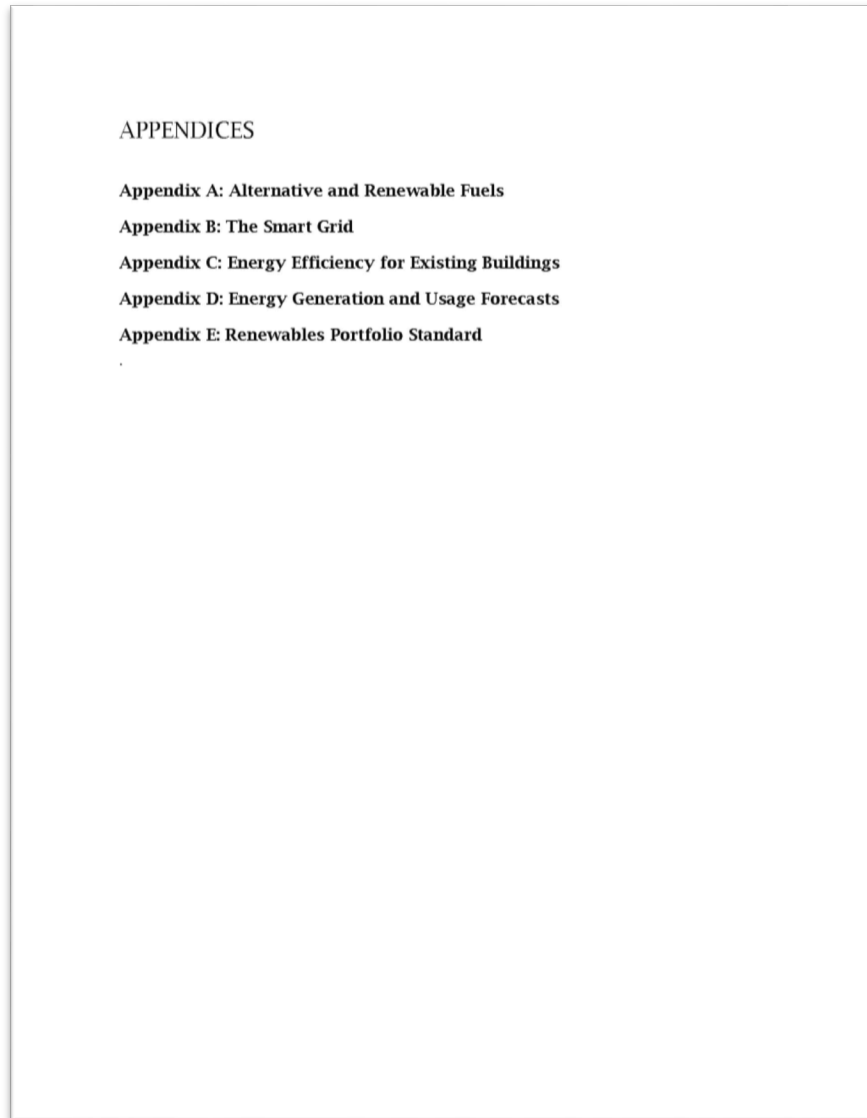
- Appendix A (or B or C, and so forth), in Tahoma 20 pt. bold, ALL CAPS, then two returns
- Title of appendix, in Title Case, Tahoma 20 pt., bold
- Text on the slip sheet saying: “This appendix is available as a separate volume, Publication Number CEC-XXX-YEAR-XXX-APX”
- The slip sheet has no visible page number

Please see **Figure 6** for an example of a slip sheet for a single appendix that is a separate volume.

If there is more than one appendix, the titles of each appendix should be listed on a single slip sheet. The title of the page, in that case, should be “Appendices” (Tahoma 20 pt., bold) with the appendix letters and titles, and the associated publication number(s), neatly arranged as a list. Please see **Figure 6** 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 online in Adobe Acrobat PDF format. (The example uses the previous font for display only. Please use Tahoma font for regular text and headings.)

Figure 6: Example of a "Slip Sheet" for Appendices



Source: California Energy Commission, Media and Public Communications Office

Appearance in Table of Contents

When preparing the table of contents for the report, you may need to enter each appendix letter and title (or attachment number and title) manually into the table of contents. Contents of the appendix, however, are generally not included within the table of contents.

Attachments

Attachments are supporting documents that usually were not written by the author of the main report. An attachment may also be supplementary 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.

Attachments are designated with Roman numerals rather than letters (Attachment I, Attachment II, and so forth).

Most previously published documents will be posted as separate files, with the respective cover pages. No credits page is needed for an appendix or attachment not funded by the Energy Commission. On the cover page where the words "Prepared By" are located, please include the following statement:

Please Note: This document is an attachment to a report prepared/funded by the California Energy Commission. The Energy Commission did not prepare or fund this attachment, but the author(s) has/have requested it be available as a supporting document.

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

Please contact the original author/publisher for additional information about the document at *[fill in company website address, phone number, or email address]*.

Attachments are usually published separately from the main report. Prepare a slip sheet and cover page(s) the same way as for appendices. Also include the attachment information in the report table of contents.

The Web Team will assign a publication number to each attachment just before publication on the CEC website. The publication number of an attachment consists of the main report 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 on, depending on the letter of the attachment. Therefore, the publication number for Attachment II of the same fictitious report published in 2020 by the Efficiency Division would be CEC-400-2020-987-ATII.

In almost all cases, attachments will require permission to publish from the copyright holder. It is the report author's responsibility to obtain this permission. You should ask the author or publisher for "written permission for electronic publishing of the document in Adobe Acrobat PDF format on the California Energy Commission website." Make sure there is no time limit on the permission.

The permission language appears on the cover of the attachment in a box like the one below. Send a photocopy of the written permission you have obtained to the Webmaster when you deliver the report and the appendices or attachments. A copy of the written permission should be given the MPCO.

CHAPTER 6:

Document Accessibility for Energy Commission Reports

What Is Document Accessibility?

Under state and federal laws and policies, the CEC is responsible for ensuring that its website and written content, including electronic documents, are accessible to people with disabilities.

Disabilities listed include:

- Blindness.
- Cognitive disabilities.
- Color blindness.
- Developmental disabilities.
- Hearing impairments.
- Manual dexterity limitations.
- Seizure disorders.
- Speech difficulties.⁴

The CEC uses accessible Microsoft Word report templates to make reports accessible to all readers. The MPCO and the Web Team run the accessibility checker to ensure the reports meet accessibility requirements before they are posted online.

Seven Principles to Creating an Accessible Word Document

The California Department of Rehabilitation's Disability Access Services outlines seven basic principles for accessibility:

1. Font style and size
2. Appropriate use of color
3. Alternative text
4. Simple tables with header rows
5. Meaningful hyperlinks
6. Built-in styles and designs
7. Accessibility testing⁵

⁴ California Energy Commission. November 2019. [Web Accessibility](http://energynet/Exec/documents/web_accessibility_guidelines.pdf), http://energynet/Exec/documents/web_accessibility_guidelines.pdf.

⁵ California Department of Rehabilitation, Disability Access Services. [Resources for Creating Accessible Content](https://www.dor.ca.gov/Home/ResourcesforCreatingAccessibleContent), <https://www.dor.ca.gov/Home/ResourcesforCreatingAccessibleContent>.

Step One: Font Style and Size

The Department of Rehabilitation's Disability Access Services recommends using sans-serif fonts because they are visually easier to read.⁶

"Sans serif" means without the decorative line. Examples include Arial and Tahoma.

For reports, the CEC templates use the Tahoma 12-pt. sans-serif font for regular text. The CEC also uses Tahoma for all headings, titles of graphics, and related source lines.

Step Two: Appropriate Use of Color

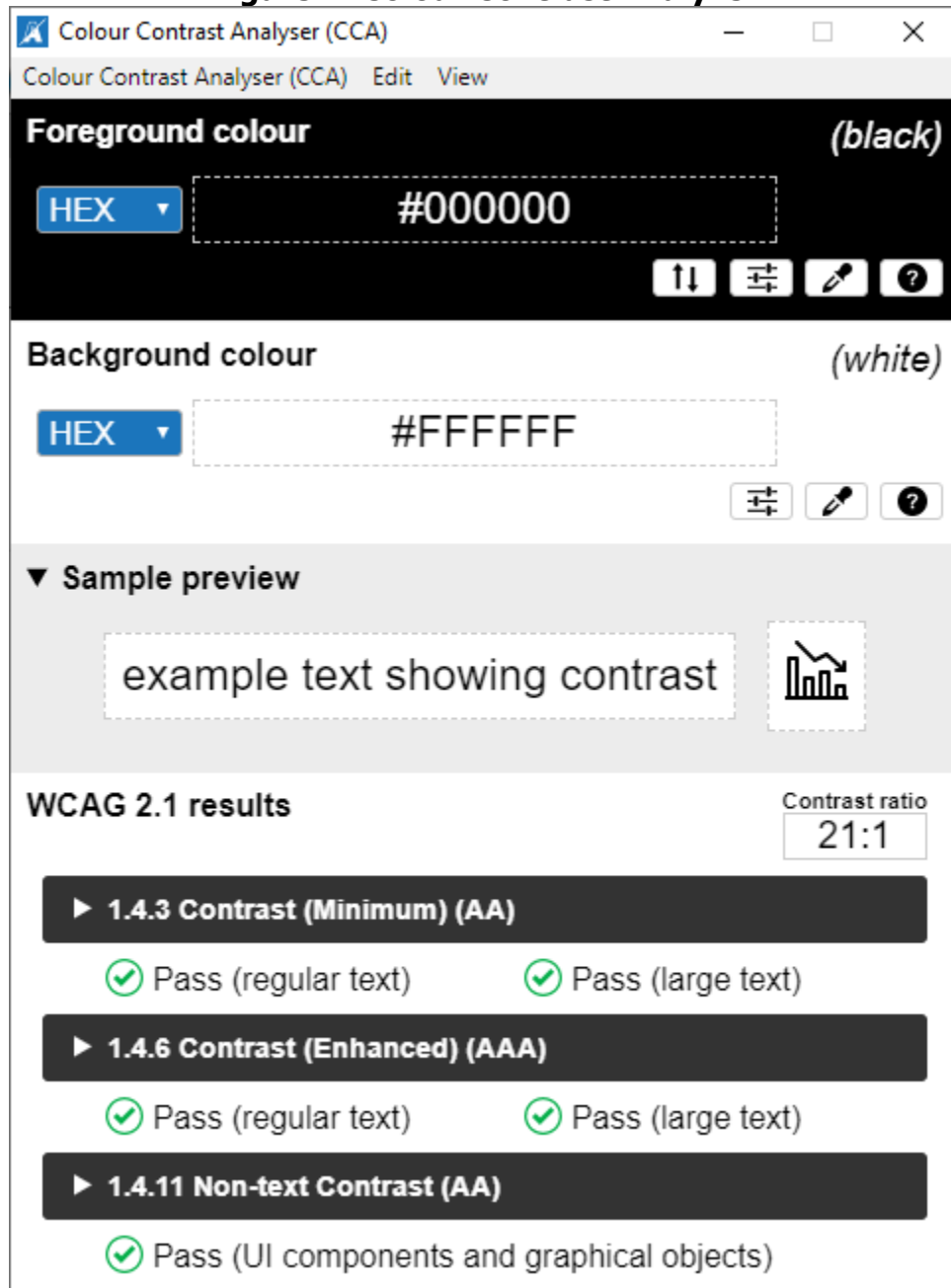
Color contrast between text and background on Web pages is important because it affects some people's ability to perceive the information visually.⁷

When creating CEC reports, ensure that the text and background have a sufficiently high level of contrast. Report writers can check for contrast using a color contrast analyzer. CEC staff members should have the application installed on their computers. If not, contact the IT Help Desk to have the analyzer installed.

6 Ibid.

7 Morton, Richard. June 2016. "[Accessibility in Government: Colour Contrast—Why Does It Matter?](https://accessibility.blog.gov.uk/2016/06/17/colour-contrast-why-does-it-matter/)" (blog), Gov.UK, <https://accessibility.blog.gov.uk/2016/06/17/colour-contrast-why-does-it-matter/>.

Figure 7: Colour Contrast Analyzer



Source: The Paciello Group

Testing for Color Contrast

To test a graphic for enough color contrast:

- Click on the top eyedropper under "foreground colour." A hollow circle will appear.
- Move the hollow circle over the color of the text, shape, or line to be tested. Click on that color.

- Next, click on the eyedropper icon under “background colour.” Hover the hollow circle over the *background* of the text, shape, or line previously tested. Click on the background.
- Under Web Content Accessibility Guidelines (WCAG) 2.1 results, the color contrast should meet the minimum “AA” standard or better.

Tips for Using Color in Graphics

Graphics are an integral part of CEC reports. In its color contrast tutorial, Michigan State University recommends the following guidelines:⁸

- Use an appropriate chart type. For example, occurrences of things over time probably should be depicted by a line chart, while comparisons at a point in time might be better depicted in a bar graph and percentages as a pie chart.
- Use hatching (sometimes called “textures”) instead of or, with proper contrast, in addition to colors in graphs and charts.
- Avoid using red, green, and orange together or in combinations on a graphic, and avoid red on black or black on red.
- Draw attention to important information in graphics by circling it rather than changing the color.
- Use high-contrast colors.
- If possible, label lines and pie slices directly; otherwise, have a clear key or lines that show which labels belong to what.
- Be sure chart keys and labeling follow proper conventions (left to right, top to bottom, clockwise).
- Be sure chart keys and symbols are large enough to be distinguished clearly on high-density screens.
- For line data points, use distinct marks such as triangles, squares, discs on each line, distinct line styles, dashes, dots, or combinations thereof.
- Include the data in an accessible table below the chart when that is needed for fullest inclusion.

⁸ Michigan State University. [Color Contrast Tutorial](https://webaccess.msu.edu/Tutorials/color-contrast.html#using), <https://webaccess.msu.edu/Tutorials/color-contrast.html#using>.

Table 6: Example of Use of Color and Nonredundant Symbols

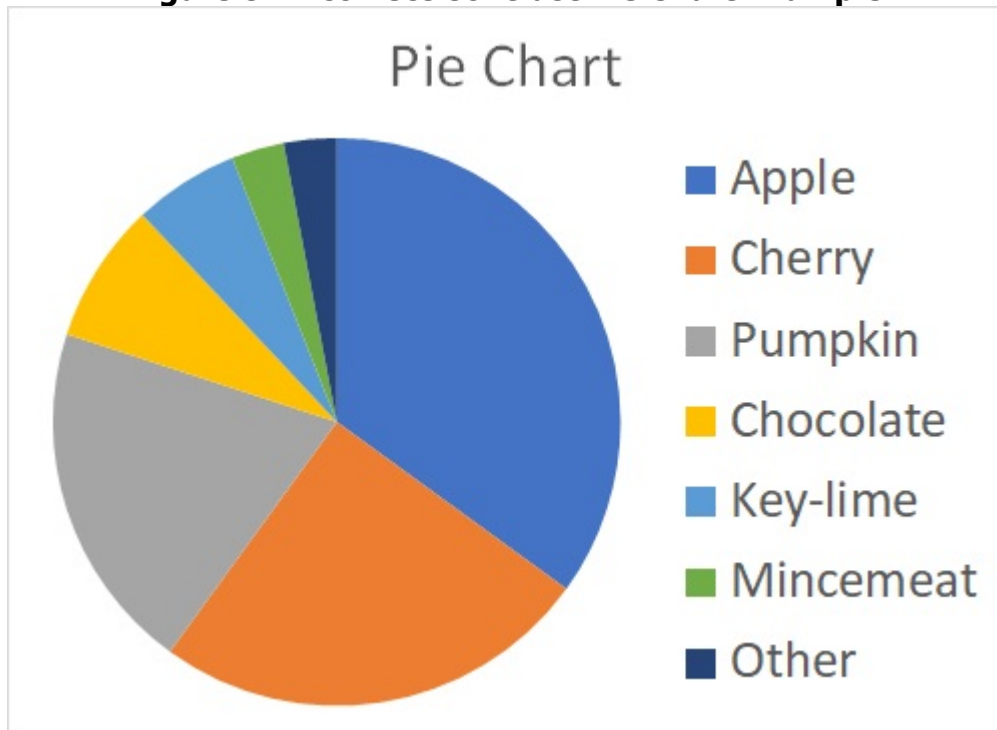
Report Title	Review Date	Completed
2019 IEPR	January 3, 2020	N
2019-2020 Clean Transportation Report	November 20, 2019	Y
2020 Commission Style Manual	January 8, 2020	N

Source: California Energy Commission

The figures are examples of two pie charts. In the first pie chart, the contrast fails on all but two adjacent colors. Moreover, a text box encloses the chart. In the second chart, each slice is labeled, and the text is larger and bolder with higher contrast than the AAA requirements.

When developing reports using color to distinguish among options, always provide a redundant element, like a differing symbol, to allow for understanding.⁹

Figure 8: Incorrect Contrast Pie Chart Example

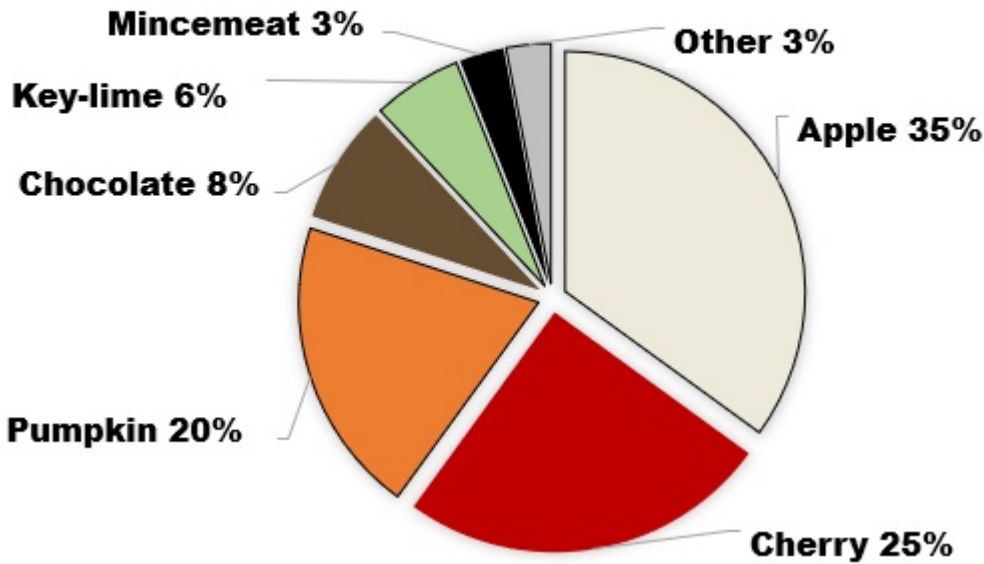


Source: Michigan State University

⁹ Ibid.

Figure 9: Final Pie Chart

PIE CHART



Source: Michigan State University

Step Three: Add Alternative Texts and Captions

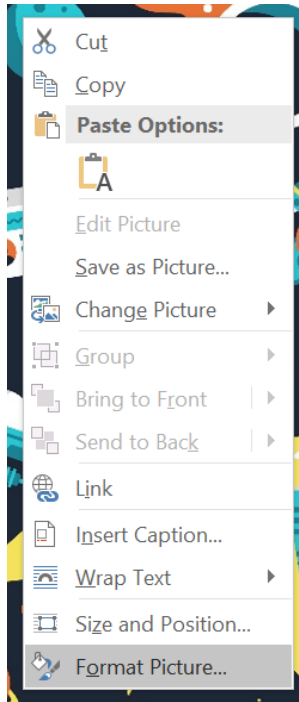
Many graphics included in CEC reports need alt text and captions. Without alt text and captions, these images will not be perceived or properly understood by people with visual disabilities.

Screen readers “read” alt text and captions, allowing the content and function of these images to be accessible to people with visual or certain cognitive disabilities.¹⁰

To add alt text using the mouse, right click (or Shift + F10) on the image and select “Format Picture.” A panel will appear on the right side. Choose the third icon that looks like a dark box titled “Layout & Properties.” When the drop-down menu appears, choose “Alt Text.”

¹⁰ California Department of Rehabilitation, Disability Access Services. June 2019. [Seven Steps to Creating an Accessible Microsoft Word Document](https://www.dor.ca.gov/Content/DorIncludes/documents/DisabilityAccessServices/Seven%20Steps%20to%20Creating%20an%20Accessible%20Word%20document%206%202019%20.pdf), <https://www.dor.ca.gov/Content/DorIncludes/documents/DisabilityAccessServices/Seven%20Steps%20to%20Creating%20an%20Accessible%20Word%20document%206%202019%20.pdf>.

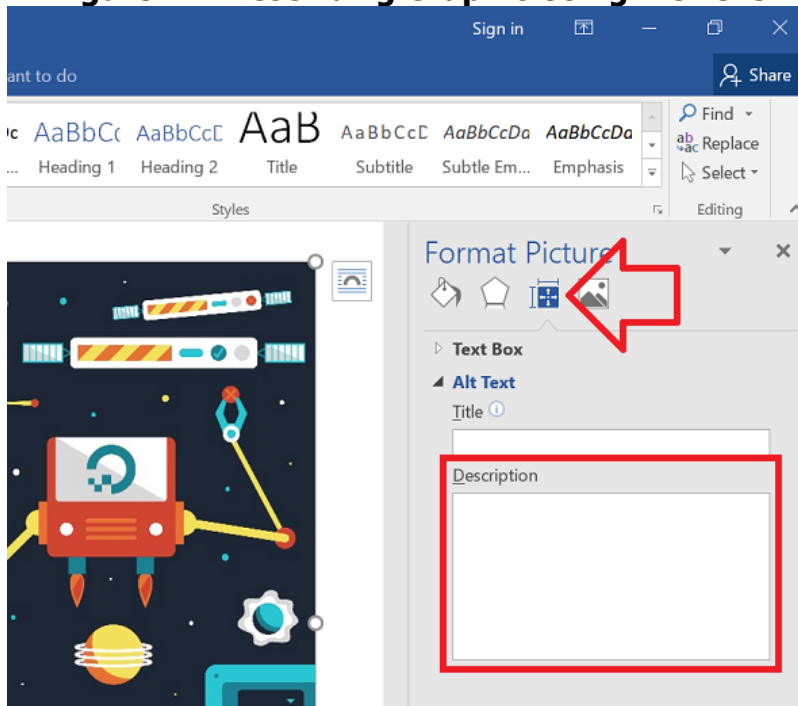
Figure 10: Format Picture



Source: IT Support Guides

Under "Title," type the title of the graphic, which should be short. In the "Description" box, describe the type of graphic, such as "a pie chart displaying the distribution of pie types." If the graph information is not displayed elsewhere in the document, then it needs to be described in the alt text.

Figure 11: Describing Graphic Using Alt Text



Source: IT Support Guides

Wrapping Text With a Graphic

When adding an image or graphic, always set the wrapping style to "In Line With Text." According to Disability Access Services, text that wraps around an image will often confuse a screen reader, making it difficult for the user to understand.

Right click (or Shift + F10) the image and select "Text Wrapping," then chose "In Line With Text."

Step Four: Construct Simple Tables

When constructing simple tables:

- Use only one row in the header.
- Never merge or split cells
- Try not to leave any cells, rows, or columns blank.

To create a simple, accessible table:¹¹

1. Select the "Insert" tab and click on the "Table" menu.
2. Select the number of rows and columns by either:

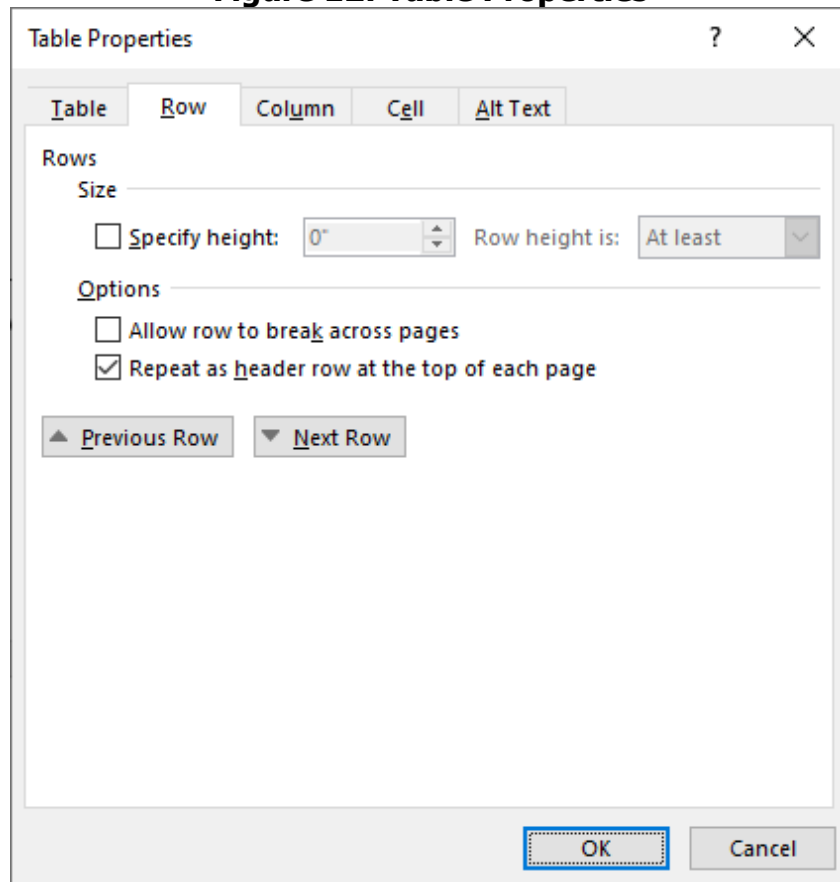
¹¹ Ibid.

- a. Using the cursor. Start at the top of the grid and drag the mouse to include all the columns and rows wanted.
- b. Navigating the keyboard—Alt, N, T, and then use arrows to choose the number of rows and columns. Press "Enter" to insert table.

Once the table has been created and populated with data, identify a "header row" to allow the heading text to be distinguished from the data area of the table.

1. Select the first row of the table. Right click (Shift + F10) for context menu. Choose "Table Properties," followed by the "Row" tab.
2. Ensure the option "Allow row to break across pages" is unchecked. Check "Repeat as header row at the top of each page" is checked.
3. Select "OK."

Figure 12: Table Properties



Source: Microsoft Word 2016

Simple tables make it easier for someone using assistive technologies to understand the table.

Step Five: Use Meaningful Hyperlink Text

Hyperlinked text should describe clearly the link destination. One of the ways a person using assistive technologies can navigate a document is by skipping from hyperlink to hyperlink or by pulling up a list of all the links in a document (Insert + F7).¹² When a screen reader reads text and there is a link, the software will insert the word "link" in front of the text to alert the user that this is a selectable hyperlink.¹³ Therefore, using phrases like "click here" or "visit" are not sufficient because they do not provide enough meaning.

Here are some examples:

- Wrong: The *2018 IEPR Update, Volume II*, can be accessed [here](#).
- Wrong: The *2018 IEPR Update, Volume II*, can be accessed at <https://ww2.energy.ca.gov/2018publications/CEC-100-2018-001/CEC-100-2018-001-V2-CMF.pdf>.
- Right: The [2018 IEPR Update, Volume II](https://ww2.energy.ca.gov/2018publications/CEC-100-2018-001/CEC-100-2018-001-V2-CMF.pdf), is available at (<https://ww2.energy.ca.gov/2018publications/CEC-100-2018-001/CEC-100-2018-001-V2-CMF.pdf>).

To add a hyperlink to a document:

1. Place the cursor where the hyperlink is to appear or simply highlight the text in the document that is to become a link.
2. In the "Insert" tab, click on "Hyperlink" (Alt, N, I), and a dialog box will open.
3. In the "Text to Display" box, type the name or phrase that briefly describes the link destination. (If text was highlighted, this box will already be filled.)
4. Choose to enter either a URL, a location within the same document, an email address, or a link to another document.
5. Type or copy it into the "Address box." Click "OK."

When creating a footnote, add the hyperlink for the citation, as well as the URL. To deactivate the URL, place the cursor immediately to the right of the URL and press "Backspace." (See any hyperlinked footnote in this style manual for an example.)

¹² Ibid.

¹³ Social Security Administration, Accessibility Resource Center. April 2010. SSA Guide: Producing Accessible Word and PDF Documents, Version 2.1, https://www.ssa.gov/accessibility/files/The_Social_Security_Administration_Accessible_Document_Authoring_Guide_2.1.2.pdf.

Step Six: Use Built-In Formatting Styles

Built-in formatting styles may be the most important step in making documents accessible. Built-in formatting styles provide a logical reading order that serves as a navigation guide for people using assistive technologies.¹⁴

The CEC's report templates are ADA-accessible. Templates for staff reports, staff papers, consultant reports, Lead Commissioner reports, commission reports, Clean Transportation Program final project reports, and Energy Research and Development Division final project reports are available on the Document Production and Notices pages of the EnergyNet intranet. Consultants who work outside the Commission may obtain a copy of the template from the contract manager for their project.

If preparing a report from scratch, use the styles pane for managing and controlling multiple styles.

Do not skip headings. Screen reader users can quickly navigate through the document using the headings, and skipping headings can confuse screen readers.

Heading 1 is used only once for the cover title. All other headings are from 2 through 6.

Step Seven: Check Accessibility

Use the following methods to check document accessibility:

- Use the Microsoft Word or Adobe Acrobat accessibility checker.
- For reading order, use a screen reader, such as Nonvisual Desktop Access (NVDA), Jobs Access with Speech (JAWS), or Window-Eyes.

To access the accessibility checker in Microsoft Word 2010, click the "File" tab of the document, click "Info," "Check for Issues," and then "Check Accessibility." If navigating by keyboard, press Alt, F, I, I.

In Adobe Acrobat, use the action wizard and accessibility tool.

Screen readers are software programs that allow blind or visually impaired users to read the text displayed on the computer screen using a speech synthesizer or braille display. The user sends commands by pressing different combinations of keys on the computer keyboard or braille display to instruct the speech synthesizer what to say and to speak automatically when changes occur on the computer screen.¹⁵

14 California Department of Rehabilitation, Disability Access Services. June 2019. Seven Steps to Creating an Accessible Microsoft Word Document, <https://www.dor.ca.gov/Content/DorIncludes/documents/DisabilityAccessServices/Seven%20Steps%20to%20Creating%20an%20Accessible%20Word%20document%206%202019%20.pdf>.

15 American Foundation for the Blind. 2019. [Screen Readers](https://www.afb.org/blindness-and-low-vision/using-technology/assistive-technology-products/screen-readers), <https://www.afb.org/blindness-and-low-vision/using-technology/assistive-technology-products/screen-readers>.

CEC staff members should have the NVDA screen reader on their computers. If not, contact the IT Help Desk to have the application installed.

Roles and Responsibilities

CEC divisions and offices are responsible for ensuring that the reports they create are ADA-accessible before sending them to the MPCO for review and the Web Team for posting online. Ensuring document accessibility means checking for accessibility for Microsoft Word and Adobe Acrobat Pro® PDF documents. [Instructions for creating and verifying PDF accessibility](#) are available on the Adobe website.¹⁶

If a contractor created a report for the CEC, they must make the document accessible. Ultimately, the division or office is responsible.

Document Accessibility Resources

The CEC has an intranet page on "[Document Accessibility Frequently Asked Questions](#)," which includes links to "Web Accessibility Guidelines" and "Web Content Review and Archive Guidelines" under the icon "[Document Production and Notices](#)."

Other resources include:

- [Disability Access Services, California Department of Rehabilitation](http://www.dor.ca.gov/Home/DisabilityAccessServices), <http://www.dor.ca.gov/Home/DisabilityAccessServices>.
- [Web Accessibility](http://energynet/Exec/documents/web_accessibility_guidelines.pdf), California Energy Commission website guidelines, http://energynet/Exec/documents/web_accessibility_guidelines.pdf.
- [Document Accessibility](https://www.dor.ca.gov/Home/DocumentAccessibility), California Department of Rehabilitation, <https://www.dor.ca.gov/Home/DocumentAccessibility>.
- [State of California Web Accessibility Toolkit](https://www.dor.ca.gov/Home/AB434), <https://www.dor.ca.gov/Home/AB434>.
- [Web Accessibility in Mind](https://webaim.org/), <https://webaim.org/>.
- [Americans With Disabilities Act](https://www.ada.gov/), <https://www.ada.gov/>.

16 Adobe. December 2019. [Create and Verify PDF Accessibility \(Acrobat Pro\)](https://helpx.adobe.com/acrobat/using/create-verify-pdf-accessibility.html#make_PDFs_accessible), https://helpx.adobe.com/acrobat/using/create-verify-pdf-accessibility.html#make_PDFs_accessible.

CHAPTER 7:

Preparing Accurate, Consistent Reports and Report Content Styles

Before you begin writing, put on the hat of an inquisitive, reasonably educated lay reader. Pretend that he or she paid for this report and wants to understand how and why you spent taxpayers' money creating it. That is your intended 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.
- 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 the nominal nameplate rating, then use that reference consistently throughout the report. If, however, the desired number was the measured performance of the device (usually different from nameplate), then consistently use that measured number. Do not mix the two in the narrative.
- The text needs to refer clearly 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 multipage 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.
- Test the document for accessibility using the Microsoft Office Accessibility Checker. (See Chapter 6: Document Accessibility.)

Apply general rules for good writing to all reports and other written materials created or funded by the CEC. MPCO recommends the following books and website to help authors develop good writing habits:

- Sabin, William A. *The Gregg Reference Manual (Tribute [Eleventh] Edition)*. McGraw-Hill Irwin, 2011. ISBN: 0072936533.
- Fiske, Robert Hartwell. *To the Point: A Dictionary of Concise Writing*. W.W. Norton & Company, Inc., 2014. ISBN: 978090383347173
- Strunk Jr., William, E. B. White, *The Elements of Style, The Original Edition*. www.bnpublishing.com, 2008. ISBN: 9562919897.
- Style Manual Committee, Council of Science Editors. *Scientific Style and Format: The CSE Manual for Authors, Editors, and Publishers (Seventh Edition)*. University of Cambridge, 2006. ISBN: 097796650X.
- University of Chicago Press Staff (Editor). *The Chicago Manual of Style (16th Edition)*. University of Chicago Press, 2003. ISBN: 0226104036.
- U.S. Energy Information Administration Office of Communications. [EIA Writing Style Guide](http://www.eia.gov/about/eiawritingstyleguide.pdf). 2015. <http://www.eia.gov/about/eiawritingstyleguide.pdf>.

The above sources may disagree on grammar and punctuation formatting, such as using a serial comma. The CEC's preference for reports is *The Gregg Reference Manual*. The MPCO recommends that each CEC office have at least one copy of that manual.

If you have a question about what the report should include, contact the Media Office Editing Unit to discuss the report. Make sure you understand all the required parts.

Writing Style

Use the **active** voice whenever possible:

- ACTIVE VOICE: The petroleum industry builds new storage facilities.
- PASSIVE VOICE: New storage facilities are built by the petroleum industry.

The CEC discourages the use of the first person (I, we, us, our) when referring to the author(s) in its reports. This admonition is not to say that you should write in the passive voice. It is possible to write in the third person and still use 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 scenarios ..."

- Third person: “The authors [or “the research team” or “the researcher” or “this project” or some other similar third-party reference] considered 12 scenarios ...”
- 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 ...” Other unnecessary words include “process,” “activities,” “efforts,” and “for the purposes of.”
- Avoid using “etc.,” “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 CEC 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. Do not make up your own acronyms. This style of writing excludes the reader by introducing words that are known to only 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. Limit the use of acronyms in the executive summary to those in the following table. Acronyms may be disallowed at the discretion of the CEC editors.

Follow these rules when using acronyms or abbreviations.

- Do not make up acronyms as shorthand for a group of words.
- Use “California Energy Commission” at first mention, and then use “CEC” throughout the rest of the report. You may also use just “Commission” in subsequent references in the same paragraph as long as no other commissions are being mentioned. Return to using “CEC” in subsequent paragraphs.
- Introduce acronyms by first using the full term, followed by the acronym in parentheses. CEC 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 5.)
- Do not introduce and use an acronym if it only appears once or twice in proximity. Rare exceptions would be cases where readers are more familiar with the acronym than the actual referent.
- Do not use the U.S. Postal Service two-letter abbreviations for states in the United States. Instead, use the full state name (example: Sacramento, California).

- Do not use “DAC” for “disadvantaged community.”

Table 7: Common and Acceptable Acronyms and Abbreviations

Original Term	Acronym/Abbreviation
Battery-electric vehicle	BEV
California Air Resources Board	CARB (as of January 2016)
California Department of Forestry and Fire Protection	CAL FIRE
California Department of Resources Recycling and Recovery	CalRecycle
California Energy Commission	CEC or Energy Commission
British thermal unit	Btu
California Department of Water Resources	DWR
California Environmental Protection Agency	CalEPA
California Independent System Operator	California ISO or ISO (not CAISO or Cal-ISO)
(California) Public Utilities Commission	CPUC
California Department of Transportation	Caltrans
carbon dioxide	CO ₂ or CO2 (Note: Make sure the 2 is not too small to read.)
community choice aggregator	CCA
cubic feet per minute	CFM
(United States) Department of Energy	U.S. DOE
distributed energy resource	DER
Electric Program Investment Charge	EPIC
Energy Action Plan	Energy Action Plan (not EAP)
Energy Efficiency Ratio, Seasonal Energy Efficiency Ratio	EER, SEER
ENERGY STAR®	ENERGY STAR® on first reference with registered trademark in superscript, followed by ENERGY STAR thereafter. Note: Can be all capitals.
Federal Energy Regulatory Commission	FERC

fuel cell electric vehicles	FCEV
Governor's Office of Business and Economic Development	GO-Biz
greenhouse gas	GHG
heating, ventilation, and air conditioning	HVAC
Integrated Energy Policy Report	IEPR
integrated resource plan	IRP
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
Low Carbon Fuel Standard	LCFS
megawatt/megawatt-hour	MW (all capitals)/MWh
million British thermal units	MMBtu
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
PIER	Public Interest Energy Research
plug-in electric vehicle	PEV
one quadrillion (10 ¹⁵) British thermal units	Quad
research, development, and demonstration	RD&D
Sacramento Municipal Utility District	SMUD

San Diego Gas & Electric Company (Note: An ampersand is the correct usage in the company name.)	SDG&E
Southern California Edison Company	SCE
Southern California Gas Company	SoCalGas
sulfur oxides	SOx or SO _x
Terawatt	TW, 1 trillion watts
thousand cubic feet	MCF but in parentheses say (1,000 cubic feet of natural gas)
United States	United States (not U.S. unless it proceeds an abbreviation for a federal agency)
United States Environmental Protection Agency	U.S. EPA (not EPA)

Source: California Energy Commission, Media and Public Communications Office

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: *The Gregg Reference Manual* (p. 9, paragraph 107a) states: "... use periods after short phrases that are essential to the grammatical completeness of the statement introducing the list."

In the example, do not put the conjunction "and" at the end of the second bullet. The above bulleted items are incomplete sentences, but because they grammatically complete the lead-in phrase, periods are used.

Rules for Bullets

If a bullet makes a complete sentence or completes the lead-in, use a period. If not, no period should be 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.)
- Do not use semicolons or commas as end marks.
- The word “and” should not end the second-to-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 (Tahoma normal, 12 pt.) but should have only 4 pt. 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 and go to pull-down menu:

Format>Paragraph>Indents and Line Spacing>Spacing After = 4 pt.

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.”

Capitalization *should* be reserved for proper nouns, which are names of *specific* persons, places, or things.

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:

- Use “energy crisis,” NOT “Energy Crisis.” A proper noun, however, like “2020 Summer Olympics” 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 “Cost of Generation Model.” (In subsequent references to the project or program or model, use the lower case for the term even though it 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 the majority of these terms (such as “World Wide Web”) lose the initial cap as well. “Website,” however, has lost the initial cap in most technology publications, newspapers, and websites.
- Do not capitalize “city” before the name of a municipality unless it is part of its formal name. 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.”
- Do not capitalize “state.”

Words that **should** be capitalized are:

- Governor, Legislature, Senate, and Assembly (when pertaining to California).
- Northern California, Southern California, and Central California.
- Cap-and-Trade Program, according to the California Air Resources Board.

Titles like “chair,” “vice chair,” and “executive director” can be capitalized when used before a name but not when used alone.

The terms that are capitalized may disagree with some grammar conventions. These are CEC style for using these terms.

Adjective Phrases and Adverbs

Do not hyphenate **adjective phrases**: “publicly owned utilities,” or **adverbs**: “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 Email Addresses

You can configure Microsoft Word to create hyperlinks automatically to Internet addresses (URLs, short for “Uniform Resource Locator”) and a mail-to link for email address. Creating the hyperlink 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 hyperlinks. Please make sure the addresses are correct and tested before submitting a report.

Note: *Email* in CEC documents should be spelled without a hyphen, following *The Associated Press Stylebook and Libel Manual*.

Try not to 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 *2019 Integrated Energy Policy Report* and *2018 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”)

Examples: Senate Bill 100 (De León, Chapter 312, Statutes of 2018)

Assembly Bill 8 (Perea, Chapter 401, Statutes of 2013)

After that first reference, reference the bill as an abbreviation (SB 100 or AB 8) 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)

- Global Warming Solutions Act (Assembly Bill 32, Núñez, Chapter 488, Statutes of 2006) After that first reference, reference the bill as a shortened title (PIIRA or whatever the act is commonly called).

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, 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.

It may be clearer, however, to use numbered bullets instead of a list in linear text.

Here are other rules for numbers:

- Use numerals for 10 and above; spell out all numbers one through nine, EXCEPT when identifying:
 - 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).
 - Numbers between 10 and 1 million. For example, use 680,000, NOT 680 thousand.
- 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, trillion, and so forth) with each figure to avoid misunderstanding:
\$5 million to \$10 million (NOT: \$5 to 10 million).
- Do not use an en dash or hyphen if a numerical sequence is introduced by the word “from” or “between.” For example, “from 1998 to 2001” or “between 2009 and 2019.”
- Write out ordinal numbers (numbers that indicate rank) under 10. Use numerals for ordinal numbers 10 and greater. Do not use superscripts for the letters in ordinal numbers. For example, write 20th instead of 20th.
- 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). 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 (for example, 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. Including a page break will ensure that headings are not left alone at the bottom of a page with no content if the Word file is opened on a different computer.

Percentages

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

- The U.S. Labor Department reported that September unemployment rate fell 0.2 percent.
- The sales tax rate in California can vary from 7.0 to as much as 10.25 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.

Punctuation

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. Moreover, do not use a colon between a verb or a preposition and the direct object unless the object appears on a separate line.

Commas

Use a serial (Oxford) 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 or Oxford comma, and it 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 name.

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

Example: Mary Jones, director of the project, oversees 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 preexisting 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 **em dash** (—) between words **but insert a space on either side of the dash**. From the Insert Menu, select Symbol > Special Characters > em dash.

Use an **en dash** (–) to show a range between numbers. Do not add a space before and after the en dash. From the Insert Menu, select Symbol > Special Characters > en dash.

Period Spacing

Use a single space after a period. Do not double space.

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: 2018*.
- 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 8:

Footnotes and References in the Text

References Within the Report Body

When referencing a report, book, or other document within the body of the report, use the format as described in *The Chicago Manual of Style, 16th Edition*.

Referencing is referring someone to the source. References (also called "citations") show the reader what different aspects of your work are based on. Insert the reference in parentheses to lead the reader to information about the page of a book or other source that is the evidence for what you have said.

For example: When you see a reference, like this: **(Robinson, C. E. 2015 p.23)**, in the text of a report, it means that you are being referred to page 23 of a book written by C. E. Robinson in 2015. To find out the title and publisher of the book, you look in the bibliography.

Footnote Citations

In footnotes, please use the following format after the footnote number:

Authors, starting with last name first for the first entry only, then first and last names for subsequent authors. Year. "Title of Article." (if available) *Title of Publication*, whether it is a book, report, fact sheet, pamphlet, or periodical. Name of publisher (if available). Publication Number, if published by the California Energy Commission. URL (if available).

Examples:

California Energy Commission staff. 2017 *2017 Integrated Energy Policy Report*. California Energy Commission. Publication Number: CEC-100-2017-001-CMF.

Pollan, Michael. 2006. *The Omnivore's Dilemma: A Natural History of Four Meals*. Penguin.

If there are 10 or more authors, list the first seven followed by an et al.

When citing from the same source as the previous footnote, use "Ibid."

If the author is unknown, start with the title, followed by the year.

CHAPTER 9:

Submitting Files to the Media and Public Communications Office

The CEC uses the Microsoft Office suite of software programs for word processing, spreadsheets, and presentations.

When submitting reports to the MPCO, please send all files relating to the document, including original figures and graphic files. That way, the CEC will be able to replicate the document in the future or convert it into future publication formats (such as XML) as technology changes.

Word and PDF Files

Send copies of the full documents as Microsoft Word **.docx** files.

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.

Convert all Word files into Acrobat Portable Document Format (PDF) files by saving as Adobe PDF.

Do not password protect or encrypt Word documents or PDF files.

Document Properties

The properties of the file must be filled out in Word and in the PDF. Go to File > Properties menu in either program and complete the information in the summary or description portion. The areas that must be filled out are:

Word Properties

- ❖ Title
- ❖ Subject
- ❖ Author
- ❖ Manager
- ❖ Company (Calif. Energy Commission)
- ❖ Category (optional)
- ❖ Keywords
- ❖ Comments (optional)

Acrobat Properties

- ❖ Title
- ❖ Author
- ❖ Subject
- ❖ Keywords

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 be given the publication number of the report or appendix. For example, CEC-180-2020-001.PDF is the file name for the PDF file for this style manual.

You should also set the properties of a PDF file so that the file fits the computer screen. This is set under the Acrobat Document Properties → Initial View. Set the page layout to “single page.” Set the magnification to “fit page.”

Graphics and Figures
















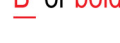
The author must send a copy of ALL graphic files used in the report along with the final document file. These files should be sent to the CEC Webmaster on the P: Drive if they cannot be sent easily via email.

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 photos in their original or raw digital format (if available) as well as in JPG or PNG. Do not use TIF or GIF files unless forced to.
- If a photo is manipulated to change contrast or fix elements, save files in Adobe Photoshop® PSD format (please include layers if used) and in JPG or PNG formats. Please make a notation that photo was manipulated and what was done.
- Save illustrations and graphic elements in their original format such as Adobe Illustrator, Adobe InDesign, or Macromedia Freehand.
- Graphics and photographs should be saved at a higher resolution, at least 300 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: ! @ # \$ % ^ & * () : ; { } [] / \ |

CEC 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 CEC reserves the right to use photographs or other graphic files in other publications or on the CEC website.

COMMON EDITOR/PROOFREADING MARKS

Symbol	Example	Meaning
	week e	delete letter, word, phrase
	fe ^r bruary	insert
	power/plant	insert space
	close up	close up
	1 st	spell out
	fulltime	insert hyphen
	B	make letter lowercase
	B	make letter lowercase
	b	make letter uppercase
	sotry	transpose letters, words
	Ph.D.	insert period
	members, who	insert comma
	end. In the	start new paragraph
	final report	let it stand (ignore mark)
	<u>Time Magazine</u>	change to italic
	<u>Figure 12</u>	change to bold