

# California Research Bureau Style Guide

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## Introduction

This “California Research Bureau Style Guide” outlines principles and methods for footnotes and endnotes and for bibliographies. It also offers a few other points of style and mechanics for CRB reports. It draws from the *Chicago Manual of Style*, 14<sup>th</sup> edition, and Kate Turabian's *Manual for Writers of Term Papers, Theses, and Dissertations*, 6<sup>th</sup> edition, with adaptations suited to CRB needs. It also draws from other published style manuals and from experience in the California Research Bureau. Basically, however, CRB style is Turabian (that is, for all practical purposes, University of Chicago), as opposed to Modern Language Association (MLA), for example.

The goals of this guide are:

- to enable users of CRB publications to be able to find any item cited in them
- to assure that each report is as consistent as reasonably possible
- to encourage CRB reports to use accepted style for notes and bibliography—and specifically University of Chicago style—rather than idiosyncratic methods or no consistent, formal style

The California Research Bureau must often produce policy studies and background papers quickly. Some reports emphasize very recent events. As a result, CRB researchers must supplement published print sources with Internet resources. Those include World Wide Web editions of newspapers, wire service reports, commentaries and organizational reports, government documents, and so on. Such sources can be trickier to document than print editions of books, newspapers, magazines, journals, and academic reports.

Because the online sources may be cited in a report via a Web URL (Uniform Resource Locator), readers have a shortcut to the cited documents. The URL can help readers find updated statistics or other more recent information than was used in the CRB report. Readers who are using a Word or Adobe Portable Document Format version of a report can simply click on a link in order to see the cited Web page.

The researcher should be clear, accurate, and informative in citing sources found on the Internet, just as in citing books and periodical articles and other printed sources. This guide suggests some ways to help meet that goal and includes URLs with several of the examples of notes and bibliography entries. But the focus of this guide is primarily on standards for laying out and documenting CRB’s reports and stand-alone bibliographies.

*Note: the last major revision of this guide was in May 2002. Smaller revisions and corrections have been made through the date shown on the title page.*

## Who is Your Audience?

The researcher must answer a few questions about the audience for each report. One guide for copyeditors suggests these questions:

- Who is the primary audience for this text?
- How much are readers expected to know about the subject?
- How will readers "use" the publication? Will it be pleasure reading or professional reading? It is a reference guide or a skim-once-and-throw-away document? Will most readers read the piece straight through, from start to finish, or will they consult sections of it from time to time?<sup>1</sup>

Although that list is for copyeditors, it is just as important for writers, and all the more so for writers who also serve as their own copyeditors.

CRB's primary audience is legislators, legislative staff, and others with a direct policy-related interest in the topic. For that reason, "pleasure reading" can be eliminated as a purpose of CRB publications (although one hopes that the reports are not unpleasant to read!). CRB publications also reach the general public and an academic audience. CRB authors can assume a serious interest in the topics because most papers are prepared by request or by arrangement to meet a current need, but they must take care to provide necessary background and to define terms. Some readers, even in the Legislature or the administration, may be relatively new to an issue no matter how seriously concerned about it, and therefore need background and context.

Legislators prefer to get right to the point, so include concise lists and summaries to focus on the key points ("bullets"). Staff members and the public need details and supporting information, so bullets alone are not enough. An "executive summary," helpful for all audiences, is customary for papers, but not needed for "CRB Notes," which are only a few pages long. The scholarly side of the audience expects full source documentation in a recognized and consistent style in all publications. The non-scholarly side does not want an excess of superscripts and notes to interrupt the flow of the document.<sup>2</sup>

In short: write clearly and document accurately but unobtrusively. Unfortunately, this is much easier said than done. For that reason, whenever possible have a colleague or two read a draft of a report with an eye on how it can be made more readable.

## Basics of Source Documentation

Documentation is an integral part of a research paper. Documentation encompasses notes and bibliography. It is not a mechanical task like printing and binding, done after the paper is completed. To the contrary, the paper is not completed if the documentation has not been completed, and in fact completed in accordance with proper style. There is sometimes a sense that documentation can be left in whole or part to secretaries, as just another clerical task like proofreading or arranging for printing and distribution. That is

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wrong. Documentation—complete, accurate, and in accordance with standard format—is one of the researcher's responsibilities.

The key principle is:

**Keep an accurate record of author, date, title, publisher or other source, and other necessary information about each item you quote or cite.**



Make sure you get it right and write it down. That prevents a lot of wasted time and headaches later on. As long as all of the information is included in the paper and is accurate, you or a secretary or editor can correct formatting errors or inconsistencies later, when the paper is put into final form.

Keep a file of research materials—newspaper and magazine articles, ephemera (printed matter not designed for long-term use or reference), printed copies of documents gleaned from the Internet, and other materials cited in your paper—so that an editor or proofreader can check quotes and references for accuracy.<sup>3</sup> Books in the CSL collection and other easily available items need not be kept in the file, but all citations must be accurate to permit checking when necessary.<sup>4</sup> It takes much longer to track down missing, incomplete, or inaccurately cited sources—and when time may be very scarce at best—than it does to take accurate notes in the first place.

You only really need to know a dozen or so footnote and bibliography formats and be aware of a dozen or so more so that you can look them up when you need them. That handful of formats will cover most, if not all, sources for most papers. If you follow a few principles all the time when doing and documenting research, anyone can produce correctly formatted notes and bibliographies from the information you provide. If you don't follow those principles or exercise due care, then someone else who is editing, formatting, or otherwise completing your work—or you, trying to complete a paper under a deadline—may have to retrace your steps and search for copies of source documents. That can be a slow, laborious, and error-prone process, extraordinarily irritating, and impossible if key information is missing.

The principles behind source citations (footnotes, endnotes) and bibliography entries are simple: you need to answer these questions:

- Who wrote it?
- What is it called?
- Where and by whom was it published?
- When was it published?

If it was not published but instead was produced privately or informally or is the result of a personal contact, then you need to note that appropriately.

The reader needs to know the name of the author, the title of the article or book, and the basic publication information, including date. For a footnote or endnote, the specific

page(s) cited must be included. The corresponding bibliography entry cites the book or article as a whole but does not usually cite a specific page or pages within it.

Cite the source you actually used. If you found a magazine article reproduced on a Web site, then the Web site *is* your source, and your note/bibliography entry should reflect that.<sup>5</sup> If you used a reprint edition, then so indicate—for example, "*Dallas Morning News* editorial reprinted in the *Sacramento Bee* [etc.]."

Because Lexis-Nexis is a formal archive of countless newspaper and journal articles, widely considered authoritative, and a source we frequently use for articles, I recommend omitting reference to Lexis-Nexis or to comparable electronic archives in citations in our papers. Our primary audience will not care whether we found the article in the print edition or in Lexis-Nexis. (This is a departure from rigorous academic practice.)

It detracts from our reputation to get a source wrong. It is not good enough to have *part* of a periodical title, or something *sort of like it*, or a guess as to *what it might have been*, or an *approximation of the book or article title*. Let's consider an example:

<p>N: Doug Henton, John Melville, and Kim Walsh, "Benchmarking Practices, Progress, Performance," <i>Economic Development Commentary</i> (Council for Urban Economic Development), Winter 1996, 2-8.</p> <p>B: Henton, Doug; John Melville; and Kim Walsh. "Benchmarking Practices, Progress, Performance." <i>Economic Development Commentary</i> (Council for Urban Economic Development), Winter 1996.</p>
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The "N:" in the example signifies that this is the format for a note (footnote or endnote). A bibliography format is signified by "B:".

To make that source unambiguous, the citation includes the publisher's name in parentheses. This is not ordinarily required for periodicals, but it is recommended for relatively specialized or hard to locate publications, in contrast to well known periodicals such as *Time* and *National Geographic*. Had the researcher cited *Economic Development Commentary* by the partial title "*Commentary*," the reader would never be able to find it, as the periodical named *Commentary* is a monthly magazine of literature and social issues published by the American Jewish Committee. It has no connection to *Economic Development Commentary*.



*Put yourself in the reader's shoes.* Picture the reader wishing to follow up on something you have written by looking at the source material. What would *you* need? (For that matter, what *DO* you need when you are tracking down sources in material you read in your research? Would *you* be handicapped by a missing or truncated author's name, inaccurate book title, inaccurate periodical name, or garbled article title?) What information would enable you to find the precise source document or other type of source, as for example an expert whom you have cited?

For a book, the needed information includes the full name of the author, the full and correct title of the book, the customary publication data (city, publisher, year), and the page or pages specifically cited or quoted. For a magazine or journal article, the needed information includes the full name of the author, full and correct title of the article, the name of the magazine or journal, including additional identifying information for obscure publications or for those whose name could be confused with a similarly named one, date, volume and issue number (for academic and professional journals), and page or pages specifically cited or quoted.

Don't reduce the cited author's name to first initial and last name, as that makes it far more difficult to find the item or to find other work by the same author. It is unacceptable to approximate or paraphrase the title or omit key publication data.

## Typical Formats

This section summarizes the most often needed note and bibliography formats, including book, magazine article, newspaper article, journal article, CRB report, California state agency or department report, federal agency or department report, and a few others. Some of the examples reflect genuine documents, and some are made up for illustration. For answers to questions not addressed here, see the *Chicago Manual of Style* or Kate Turabian's *A Manual of Style for Writers of Term Papers, Theses, and Dissertations*.

“Note” means a footnote (bottom of page) or endnote (end of document) that cites a source. The principles are identical whether the notes are at the bottom of the page, the end of a chapter, or the end of the paper. CRB style is now, generally, to use endnotes, placed at the end of the paper, for source citations and to use footnotes, placed at the bottom of the page, only for comments, explanations, asides, and the like.

Why do footnote and bibliography formats differ? One reason is the need to alphabetize bibliographies by last names of authors. There is no need to turn the name around in a note, but there is in the bibliography because they are sorted alphabetically by author's last name. Aside from that, in this type of format (University of Chicago style), you can think of the note as being like a sentence. The information is laid out with commas and parentheses, ending with a period. In contrast, the bibliography entry is a series of fields, each ending in a period. Beyond that, the specific details of the formats are arbitrary. There are perfectly reasonable alternatives, and we have all seen plenty of them. For consistency, one type of format should be selected and followed—and that is the reason for this guide. Some examples, based on the *Chicago Manual of Style*, follow.

### Book



N: Ivar Berg, <i>Education and Jobs: The Great Training Robbery</i> (N.Y.: Praeger, 1974), 54. B: Berg, Ivar. <i>Education and Jobs: The Great Training Robbery</i> . N.Y.: Praeger, 1974.
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N: John Smith, *My Life and Times* (New York: Wilton House, 1934), 9-10.  
B: Smith, John. *My Life and Times*. New York: Wilton House, 1934.

An edited anthology looks like this:

N: A. S. Burack, ed., *The Writer's Handbook* (Boston: The Writer, Inc., 1976).  
B: Burack, A. S., ed. *The Writer's Handbook*. Boston: The Writer, Inc., 1976.

In this case, by the way, the editor's name was always shown on the title page as initials plus last name: A. S. Burack. That situation is an exception to the "full name" rule.

### Article or Chapter in an Edited Anthology

N: Lois Duncan, "That All-Important Rewrite," in A. S. Burack, ed., *The Writer's Handbook* (Boston: The Writer, Inc., 1976), 153.  
B: Duncan, Lois. "That All-Important Rewrite." In A. S. Burack, ed., *The Writer's Handbook*, 151-55. Boston: The Writer, Inc., 1976.

### Magazine article\*

N: John Smith, "How a Spider Weaves a Web," *The Nature Observer*, June 1934, 56-57.  
B: Smith, John. "How a Spider Weaves a Web." *The Nature Observer*, June 1934.

Include the URL for a magazine article that you obtained online. An URL is an optional courtesy for the reader if your source was the print version itself.

B: Kennedy, David M. "Can We Still Afford To Be a Nation of Immigrants?" *The Atlantic Monthly*, November 1996.  
<http://www.theatlantic.com/issues/96nov/immigrat/kennedy.htm>

Microsoft Word can turn the URL into a link, showing it in color and underlined, but this is not the place for an explanation of how to do that. (It is simple, but more easily shown than explained in writing, and requires that a Word style setting be correct. Consult a Word manual or ask an experienced Word user for a demonstration.) The URL can and typically should be copied from the browser and pasted into Word to assure that it is accurate. Retyping often leads to errors.

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\* Please also see section on "Article in a Professional or Academic Journal," below. If it is impractical to track down volume and issue number for a journal article, then treat the citation like a regular magazine article, as shown in this section. But where the volume and issue number are available and included, then use the format in "Article in a Professional or Academic Journal" and carefully note the punctuation conventions shown there.



## Newspaper article

Cite newspaper articles similarly to magazine articles. The most common differences are page number formats, because newspapers usually have a section plus page number rather than just a page number, and that newspaper articles are sometimes a series spanning two or more days. It is also important to note the *edition* of the newspaper, where there is more than one. For example, we sometimes cite articles in the Orange County or Ventura County edition of the *Los Angeles Times*. The Bureau receives the National Edition of the *Los Angeles Times*, so the content and pagination are not necessarily the same as in the Metro edition.

For example:

- N: Ramon G. McLeod, "A Plan to Reduce Citizenship Delays: INS Requesting Funds to Attack Backlog of Naturalization Cases," *San Francisco Chronicle*, August 27, 1998, A3.
- B: McLeod, Ramon G. "A Plan to Reduce Citizenship Delays: INS Requesting Funds to Attack Backlog of Naturalization Cases." *San Francisco Chronicle*, August 27, 1998.
- N: Christopher H. Schmitt and Pete Carey, "Legislature for Sale: How Money Rules Sacramento," five-part series, *San Jose Mercury News*, January 8-12, 1995.
- B: Schmitt, Christopher H., and Pete Carey. "Legislature for Sale: How Money Rules Sacramento," five-part series. *San Jose Mercury News*, January 8-12, 1995.
- N: Scott Steepleton, "Seal's Fate May Be Sealed," *Los Angeles Times*, May 5, 1997, Ventura County Edition, Metro 1.
- B: Steepleton, Scott. "Seal's Fate May Be Sealed." *Los Angeles Times*, May 5, 1997, Ventura County Edition.

The Schmitt and Carey articles would also show page number(s) in a footnote if necessary. Page numbers are not needed if the citation is to the series as a whole, and they would clutter the note without serving a purpose.

Page numbers may be missing or inapplicable for newspaper articles from electronic databases or Internet sites. Given all of the other information (author, title, newspaper name, edition if applicable, date), a reader should be able to find the cited item. That is the essential requirement and will suffice where page numbers are not also available.

Newspaper articles are usually *not* included in bibliographies for papers, although CRB practice has varied.<sup>6</sup> As a rule, omit newspaper articles from bibliographies except for major articles or series of articles, especially if the article or series has received statewide or national attention and if you have cited it several times. What constitutes "major" is a judgment call for the researcher—but an article that is substantive and encompasses three or more pages would qualify.

The 1998 and 2000 bibliography projects were not like a bibliography in a typical CRB paper. By design they included newspaper articles and editorials along with reports, pamphlets, books, and transcripts. Any similar freestanding bibliography—a quick guide to background rather than documentation for a report—would likewise include newspaper articles.

### ***Editorials***

Newspaper editorials—opinion pieces that state the editorial position of the newspaper, may be cited this way:<sup>7</sup>

N: <i>Wall Street Journal</i> (editorial), "Peace Gets a Chance," November 1, 2000, A26. B: <i>Wall Street Journal</i> (editorial). "Peace Gets a Chance." November 1, 2000.
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The same principle applies to magazine editorials. Note that *editorials*, which represent the editorial opinion of the newspaper, are not the same thing as "op-ed" opinion pieces, so named from their typical appearance on the page opposite the editorial page. Those are treated like other by-lined articles.

### ***City of Publication for Newspapers***

Many newspapers include the city of publication in the name of the newspaper. For example, *Los Angeles Times* and *San Francisco Chronicle*. Some, such as the *Press Enterprise*, published in Riverside, California, do not. In the latter case, it is best to include the city of publication (in parentheses, not italicized). For example:

N: Joanna Frazier, "Vets Home Tells Officials It's Working on Problems," <i>Press Enterprise</i> (Riverside), July 12, 2000, Local B1. B: Frazier, Joanna. "Vets Home Tells Officials It's Working on Problems." <i>Press Enterprise</i> (Riverside), July 12, 2000.
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Because our audience is predominantly in the Capitol, it is not necessary to specify the state as well as the city for relatively well-known California papers, but for non-California U.S. papers, include the state. For example: *The Times-News* (Twin Falls, Idaho); *The Record-Courier* (Gardnerville, Nevada); *The Bulletin* (Bend, Oregon). Some foreign papers required identification by location. For example: *The Times* (London).

### ***URLs for Newspaper Articles***

Although some newspaper articles may be available online indefinitely and with an unchanging URL (Web address), many are available only temporarily. *Los Angeles Times* articles, for example, are available free online for two weeks. After that, they are archived and available for a fee; the original URL only leads to an error message. It serves no purpose to cite the URL in such cases. We often obtain newspaper articles via Lexis or another electronic archive. In those cases, no URL should be provided. A strict standard would require an indication that the article was retrieved from Nexis or Electric Library

or other electronic source. But for CRB's purposes, that is optional and probably best omitted as cluttering the citation and adding no needed information.

### Article in a Professional or Academic Journal

Professional and academic journals have volume and issue numbers. Most also have dates. Show both the volume/issue *and* the date, as shown in this example:

N: William A. Orme, Jr., "NAFTA: Myths versus Facts," <i>Foreign Affairs</i> 72, no. 5 (November/December 1993), 11. B: Orme, William A., Jr. "NAFTA: Myths versus Facts." <i>Foreign Affairs</i> 72, no. 5 (November/December 1993).
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### Anonymous Author (Articles without Bylines)

Let me quote Turabian on this: "Using *anonymous* in place of the name of an author is not recommended. If the name of the author is not reliably established, the note reference should begin with the title of the work."<sup>8</sup>

Likewise (§9.31): "A work for which no author (editor, compiler, or other) is known appears in a bibliography under the title of the work, alphabetized by the first word, or by the first word following an initial article [a, an, or the]." For example:

B: "Asthma Epidemic." <i>CQ Weekly</i> , December 24, 1999.
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Compare, however, to the suggested format for an editorial. In that case, the publication (the *Sacramento Bee*, for example) is treated as the author. See the section on newspaper articles.

### CRB Report

Not surprisingly, as a result of the timeliness and general excellence of CRB reports, we cite them frequently. The following is recommended as the standard format:

N: Chloe Bullard, <i>Qualified Teachers for All California Students: Current Issues in Recruitment, Retention, Preparation, and Professional Development</i> (Sacramento: California Research Bureau, California State Library, August 1998), 15-17. B: Bullard, Chloe. <i>Qualified Teachers for All California Students: Current Issues in Recruitment, Retention, Preparation, and Professional Development</i> . Sacramento: California Research Bureau, California State Library, August 1998.
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Note that the publisher is cited as California Research Bureau, California State Library. Note also that the month and year are shown because CRB reports show both on the cover. The report number (for example, CRB-98-012, for Chloe Bullard's report) is

optional for CRB reports, although for reports from state and federal agencies such identifying numbers can help the reader find the precise document cited.

### **California State Agency or Department Document**

California reports and other documents can be a nuisance to cite, as they don't always specify full publication data (place, publisher, date). Often such documents are prepared without the sponsoring agency thinking about how readers might cite them later. (And to be fair, the people who prepare the documents are not librarians or publishers, and they often have all they can handle just to get the document completed and into print.) It may be possible to get a reliable, well formatted citation by looking up the document on Melvyl (UC online catalog) or the CSL's Web-based catalog. I recommend trying that when the document itself is ambiguous or confusing about publisher, date, or place.

N: California Department of Education, Education Finance Division, *Report on the Governor's Budget for 1998-99* ( Sacramento: the Department, March 1998).  
B: California. Department of Education. Education Finance Division. *Report on the Governor's Budget for 1998-99*. Sacramento: the Department, March 1998.

### ***Little Hoover Commission***

The Little Hoover Commission is so called in honor of the original Hoover Commission. That commission, headed by former President Herbert Hoover, made inquiries and published recommendations regarding federal government economy and efficiency. The success of the Hoover Commission spawned state versions across the country, called Little Hoover Commissions. The *formal* name of California's Little Hoover Commission until recently was The Milton Marks Commission on California State Government Organization and Economy. The Commission has now dropped that formality and identifies itself simply as the Little Hoover Commission. It may be cited as follows:

N: California Little Hoover Commission, *Dollars and Sense: A Simple Approach to School Finance* (Sacramento: the Commission, July 1997).  
B: California. Little Hoover Commission. *Dollars and Sense: A Simple Approach to School Finance*. Sacramento: the Commission, July 1997.

### ***Legislative Analyst's Office (LAO)***

The following is suggested for LAO documents:

N: California Legislative Analyst's Office (LAO), *State and Regional Economic Developments in California* (Sacramento: LAO, 1998).  
B: California. Legislative Analyst's Office (LAO). *State and Regional Economic Developments in California*. Sacramento: LAO, 1998.

This format is suggested because references to “LAO” are so frequent in the California legislative setting that it is appropriate to make the connection explicit in reports and

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bibliographies that will be used in the Capitol. Note that "California" is followed by a period in the bibliography entry for a state document, as in the examples above for Little Hoover Commission and LAO. Then come a space and the name of the department or agency or office. (See page 7 for a comment on why the difference between footnote and bibliography punctuation is reasonable.)

### ***State Auditor***

The State Auditor has been vexing, but following is a suggestion that accounts for both the formal name of the agency and the authorship indicated on the cover of the reports.

<p>N: California State Auditor, <i>Department of Consumer Affairs: Lengthy Delays and Poor Monitoring Weaken Consumer Protection</i> (Sacramento: California Bureau of State Audits, November 2000).</p> <p>B: California. State Auditor. <i>Department of Consumer Affairs: Lengthy Delays and Poor Monitoring Weaken Consumer Protection</i>. Sacramento: California Bureau of State Audits, November 2000. <a href="http://www.bsa.ca.gov/bsa/pdfs/2000_111.pdf">http://www.bsa.ca.gov/bsa/pdfs/2000_111.pdf</a>.</p>
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State Auditor reports generally seem to have only "State Auditor" indicated as author. But if a report shows a specific personal author, then your citation should match.

### **Federal Agency or Department Report**

Federal documents can be difficult because there are so many of them and their authorship and sponsorship may be uncertain or complex. In general, the format is as follows, where there is a named author:

<p>N: Lynn Margherio and others, <i>The Emerging Digital Economy</i> (Washington, D.C.: Secretariat on Electronic Commerce, U.S. Department of Commerce, 1998).</p> <p>B: Margherio, Lynn, and others. <i>The Emerging Digital Economy</i>. Washington, D.C.: Secretariat on Electronic Commerce, U.S. Department of Commerce, 1998.</p>
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Where the document has no named individual author but is considered to be under the authorship of the agency:

<p>N: U.S. Department of Commerce, <i>America's Clusters: Experiences and Lessons Learned</i> (Washington, D.C.: the Department, June 1996).</p> <p>B: U.S. Department of Commerce. <i>America's Clusters: Experiences and Lessons Learned</i>. Washington, D.C.: the Department, June 1996.</p>
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Note that publisher is simply a reference back to "the Department," rather than U.S. Department of Commerce. Use this as a general format where the author (an organization, department, agency) is also the publisher and there is no obvious alternative.

If the organizational authoring agency is also commonly identified by its initials, then that is an alternative to “the Department” or similar reference. See the section above on the Legislative Analyst's Office for an example.

Many U.S. government documents are published and distributed by the U.S. Government Printing Office.\* For example:

N: U.S. General Accounting Office, *Education Reform; School-Based Management Results in Changes in Instruction and Budgeting*, GAO/HEHS-94-135 (Washington, D.C.: U.S. Government Printing Office, August 1994).  
B: U.S. General Accounting Office. *Education Reform; School-Based Management Results in Changes in Instruction and Budgeting*, GAO/HEHS-94-135. Washington, D.C.: U.S. Government Printing Office, August 1994.

This example includes an identifying series and number in addition to the title. This is a convenience to the reader, and may help in finding the specific document again if needed in the future. Include that information whenever possible.

It is recommended that all federal documents with departmental or agency authorship be cited in the form shown above. That way, when alphabetized, all are together, sorted by agency with a U.S. group. Where there is a named author shown on cover, title page, or both, it is appropriate to list the document by the author's name. If you have to search for the author's name in the fine print, then treat it as agency authorship.<sup>†</sup> The same practice applies to state documents (California or any other state). Unfortunately, some state documents are poorly described on covers and title pages or may lack a traditional title page and publication information entirely. Sometimes the document may be found in the UC Melvyl catalog or the CSL catalog. In that case, it is simplest to borrow from the catalog information.

### **Doctoral Dissertation**

If a dissertation has been published, then it is cited like any other published work, and the fact that it started as a dissertation is not relevant. Then it is simply a book. You can mention that it was originally a dissertation in an annotation, however, if you wish.

Here is an example of an *unpublished* dissertation:

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\* But do not simply assume that a federal document is published by GPO. Check the publication information for that specific publication.

<sup>†</sup> See how Melvyl (UC catalog) handles the item. If the UC catalogers cited an individual author, then it is appropriate to follow that lead. I am increasingly (after going through the editing of the 2003 Public Policy Bibliography) inclined to be sure to cite named authors where they can be found, even if in the fine print.

N: T. Anthony Quinn, "Carving Up California: A History of Redistricting, 1951-1984" (Ph.D. dissertation, Rose Institute of State and Local Government, Claremont McKenna College, 1988).  
B: Quinn, T. Anthony. "Carving Up California: A History of Redistricting, 1951-1984." Ph.D. dissertation. Rose Institute of State and Local Government, Claremont McKenna College, 1988.

An unpublished dissertation obtained from UMI Dissertation Services may be cited this way:

N: Diana Nor Lockard, "Watershed Years: Transformations in the Community Colleges of California, 1945-1960" (Ph.D. dissertation, Claremont Graduate School, 1986; reproduction by UMI Dissertation Services, 1999).  
B: Lockard, Diana Nor. "Watershed Years: Transformations in the Community Colleges of California, 1945-1960." Ph.D. dissertation, Claremont Graduate School, 1986. Reproduction by UMI Dissertation Services, 1999.

An unpublished dissertation's title should be shown in quotation marks, not italics.

### **Prepared Testimony**

The key is to identify who, what, where, when. For example:

N: American Farm Bureau Federation, "Statement of the American Farm Bureau Federation to the Forestry, Resource Conservation, and Research Subcommittee House Agriculture Committee Regarding H.R. 2609, the Methyl Bromide Use Act of 1998," Congressional Testimony, June 10, 1998.  
B: American Farm Bureau Federation. "Statement of the American Farm Bureau Federation to the Forestry, Resource Conservation, and Research Subcommittee House Agriculture Committee Regarding H.R. 2609, the Methyl Bromide Use Act of 1998." Congressional Testimony, June 10, 1998.

### **Transcripts of Speeches, Interviews, and Broadcasts**

Here again: who, what, where, when:

N: Anthony Fest and Bob Edwards, "Squid Fishing," *Morning Edition (NPR)* transcript, November 18, 1997.  
B: Fest, Anthony, and Bob Edwards. "Squid Fishing." *Morning Edition (NPR)*. Transcript, November 18, 1997.

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### Personal Communications, including Correspondence and Interviews



The suggested format is:

N: Jane Doe, Sacramento area general contractor, personal communication, October 9, 1998.

Or, if the passage you are footnoting already indicates that you are citing Jane Doe and that she is a Sacramento area general contractor:

N: Personal communication, October 9, 1998.

Where it does not interfere with readability, put the information in the text itself so that you do not need a note. For example: "Jane Doe, a Sacramento area general contractor, advised in a telephone call to the author (October 9, 1998) that the recently enacted requirements for documenting payments to subcontractors had proven to be workable for all parties, although she suggested certain clarifications in the precise wording."

The point is to make it clear that *you* obtained the information personally from the named individual. Your reader cannot duplicate this research without contacting the same individual. It is not ordinarily necessary for our purposes to specify whether the information was received via phone call, e-mail, or other person-to-person means. But additional specificity is ok at the option of the researcher.

If your information comes from an interview, cite it as you would a personal letter.

A bibliography may, at the author's discretion, include a list of interviews conducted in connection with the paper. In that case, for each interview include name, affiliation or other pertinent information (so the reader has some notion of who the person is or why he or she is a source), and date. This is optional, and it may be unnecessary where interviewees are cited in notes.

### Memos and Letters to a Third Party

Cite this sort of thing in footnotes. Generally it is not necessary to list such documents in a bibliography unless they form a substantial portion of the research for the paper or—and this seems unlikely in the sort of work CRB does—they include lengthy, significant documents. In that case, a brief statement regarding the use of such source material is more appropriate than individual listings within the bibliography.

If you cite documents of this type, use a note along these lines:

N: Letter from John Q. Smith, CEO of Hocking Atmospheric Company, to Rodney L. Hackenschmidt, Director of the California Department of Industrial Anthropology, January 3, 1996.

### **Reports Published by Groups, Companies, and Organizations**

Groups, companies, and organizations are under no obligation to provide the sort of detailed publication data that commercial publishers almost invariably provide on title pages and on the verso page—the back side of the title page. Often they are less than helpful to those who would like to cite the documents. Sometimes the information provided is downright befuddling. If it is difficult for *you*, with the document in hand, think how hard it will be for your reader to track down a copy if you are not as informative as possible when citing it.

Use something along these lines (the example is fictitious):

N: Jones and O'Malley, Consultants, "The Economic Outlook for California in 1999," brochure prepared for the Outlook 1999 Expo, Los Angeles, September 12, 1998. B: Jones and O'Malley, Consultants. "The Economic Outlook for California in 1999." Brochure prepared for the Outlook 1999 Expo, Los Angeles, September 12, 1998.
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### **Miscellaneous Unpublished Print Documents**

We sometimes need to cite informal or semi-formal unpublished documents not attributable to an organization and not addressed in previous sections. These include handouts provided by speakers at conferences and discussion papers prepared and distributed by academic researchers. Where a formally published version can be obtained and cited, as for example a section within published conference proceedings, it is preferable to obtain and cite that in place of a more informal version, as the formal citation better enables the reader to find a copy for himself or herself.

Where necessary to cite a document of this type, the following format is suggested, using a fictitious example:

N: John J. Black, "Planning for Earthquake Contingencies," conference handout prepared by author, 1998 Emergency Response Conference, Van Nuys, California, May 4, 1998.
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In general, it is best to omit ephemera of this sort from the bibliography except where the document is substantial and is likely to be available to the reader.

### **Web and Internet Documents**

There is no general agreement on how to handle these, but the whole question of citing Internet sources is becoming more important by the day. My recommendation is to cite author, title, organization (if relevant), date, and URL (uniform resource locator) or other applicable source information. It often is also important to note the date the page was accessed, although this would not be necessary where the posted page is something that

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has been published in a magazine or other print source and where the citation includes author, title, publication, and date of the print publication along with the URL.

Here is an example of a commercially released document found on the Web.

B: Bank of America. "The Outlook for the California Economy Looks Good Despite Increased Risks." December 10, 1997.  
<http://www.bankamerica.com/news/news265.html>

For documents that might change without notice, it is best to include the date the page was accessed, at least in a note citing the document. When the document has been posted by a major company and itself has a specific date, like the example above, the date the file was accessed is optional or outright unnecessary. (*Or so I thought when I wrote that. In fact, that URL does not point to the intended article, but rather to a regularly updated news page with links to current articles. Caveat lector—let the reader beware.*)

Do not insert a hyphen to break an URL (uniform resource locator—Web page address) at the end of a line. Use a space instead to break the line if necessary, and where possible begin the URL on a new line so that it does not break at all. By now folks should know that the URL is one continuous line, even if it is broken for typographical reasons. URLs are likely to be a perpetual annoyance, though, as URLs are sometimes very long and therefore awkward.

Treat personal e-mail like other correspondence, as "personal communication," with date, name of individual, and any other pertinent information. Posts to online discussion groups should be cited as such, citing the group, date, subject, sender. It is prudent to obtain permission before quoting such posts in a CRB publication, except for anonymous quotations used to illustrate, emphasize, or clarify a point.

Newspaper or periodical articles found online should be cited accordingly, even when in the Internet edition of a recognized print periodical, such as the *New York Times*. Strictly speaking, other electronic documents (on CD-ROM collections or retrieved from electronic document services) should also be cited with reference to actual (electronic) source in addition to the customary source information. (See §8.141 of Turabian's *Manual for Writers*, Sixth Edition, for more detail.) But as noted elsewhere in *The CRB Style Guide*, that is not necessary for CRB's purposes when the document is obtained from an authoritative source such as Lexis-Nexis. When in doubt—for example if citing an abstract or report from a CD-ROM disk compilation documenting a conference—do include a reference to the electronic source.

### **Secondary Sources<sup>9</sup>**

If you use a quotation from a secondary source, the citation must show both the primary and secondary sources. For example:

Education is not completed with college. Rather, education is a continuing part of life, as argued by S. J. Oleon:

As viewed from the world of business, what was studied in college is yesterday's knowledge. But what will be needed for a future business career is tomorrow's knowledge . . . no matter how much education one has, it is not enough. It will not last a lifetime; it will soon be obsolete. Unless one devotes time and energy to continue his education, he will become an educational dropout. Don't let it happen to you.<sup>1</sup>

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<sup>1</sup>S. J. Oleon, "Changing Patterns in Continuing Education for Business," Center for the Study of Liberal Education for Adults, Boston University, 1967, p. 6. Quoted in Harold G. Kaufman, *Obsolescence and Professional Career Development* (N.Y.: AMACOM, 1974), 133.

Note the difference between the primary and secondary source of a quotation. In this case, Oleon's article is the primary source. Kaufman's book is the secondary source. Because the writer found the quotation in Kaufman's book, he must cite both sources, using the information in Kaufman's footnote to the quotation.<sup>10</sup>



When you can, look up the primary source and quote it directly. You might even find a better passage or find that the passage was quoted incorrectly or used out of its proper context by the author of the secondary source.

It is usually best to quote at least a full sentence. For less than a sentence, it may be better to rephrase the idea in your own words. If you use partial-sentence quotations, work them into your own sentences in a smooth and grammatically correct fashion. For example, one might advise readers to heed Harold G. Kaufman's advice that "education is a continuing part of life," for as a lifelong endeavor it "is not completed with college." This is scarcely the most elegant of examples, but it shows the principle. For a better example, see section 10.12 of *The Chicago Manual of Style*, 14th Edition. Better yet, see that manual's entire section on quotations.

When you do quote, properly identify the material *as* quoted. Use quotation marks, or use block form—indentation and single spacing—for longer passages, and cite the source. Set off anything that you insert in a quoted passage in [brackets], not in (parentheses).

### **Laws and Legislation**

Although laws and proposed legislation are not usually listed in a bibliography, they are often cited in notes or in the body of a paper. To prevent ambiguity and to enable the reader to find the specific law or bill cited, be sure to include complete information. If you cite a bill number, include author and year. If you cite a law, include chapter number and year (for example, "Chapter 34, Statutes of 1996" for a California law, or "P.L.



[Public Law] 101-32” for a Federal law). The year is especially important, as chapter numbers start over at 1 each year. Specify the actual year, not “this year” or “last year.”

It is recommended that you also include the bill number, author, and, where pertinent (and feasible), Code and sections when citing an enacted law. A reader who does not have access to the bill itself might be able to find the language in, say, the Corporations Code, with a section reference.

### **Site Visits and other Direct Observation**

Sometimes researchers obtain information by visiting schools and observing classroom activities, touring farms, or otherwise directly observing or taking part in what they are writing about.<sup>11</sup> Often, this sort of research is simply reflected in the writing and not necessarily documented through notes or source listings. It may make sense to include a footnote citing direct observation (with place and date) as source.

The bibliography may, at the author's discretion, include a section listing site visits and other pertinent first-hand sources of information contributing to the paper.

## **Miscellaneous Style Points**

Comments and suggestions on several topics follow. This is far from a complete list, as it omits captions, figure numbers, tables of figures, and footers, for example.

### **Quotation Formats: Run-In vs. Block**

Relatively brief quotations are usually run into the sentence, enclosed in quotation marks. Longer quotations, typically four lines or more, generally should be an indented block—a half-inch (0.5") indentation from the left seems to be about right, and is my recommendation. *However*, in a footnote or endnote the quotation should be run in, not set in a block. (Sometimes an exception may be appropriate—this is a judgment call.)

Sometimes, for emphasis, it is appropriate to place a brief quotation in indented block form.

Note that indented block quotations are NOT enclosed in quotation marks. See the section above on **Secondary Sources** for an example.

Enclose a quotation within a quotation in single quotation marks, like this: “The man shouted 'Fire! Fire!' and ran from the building.”

See Turabian's *Manual for Writers*, Chapter 5, especially §§5.11-16 for more detail.

CRB uses curly quotation marks, not straight ones. Be aware that the curly quotation marks do not always reproduce properly in other software or non-Windows systems.



## Spaces

Use one space after a colon (except the colon used in stating time, of course). Use one space after the end of a sentence.<sup>12</sup> Use one space between a person's initials.

Below, • shows where a space would be, to illustrate the preceding points.

**Please note:•the office closes at noon and reopens at 1:00.**

*One space after the colon, none in the time.*

**The movie stars E.•G. •Marshall.•It is being shown tonight on Channel 8.**

*One space between the initials, one after the end of the sentence.*

**U.S.•Department of Defense.•Military Preparedness for the 21<sup>st</sup> Century.**

**•Washington, D.C.:•the Department, 1998.**

*One space after each period here, where each ends the equivalent of a sentence. (But none between U. and S., which by convention are unspaced: U.S.) One space after the colon. By the way, the Department of Defense title is a fictitious example. I think.*

Use non-breaking spaces (and non-breaking hyphens) to avoid awkward line breaks. A non-breaking space is entered by holding down the shift and alt keys and tapping the space bar. A non-breaking hyphen is entered by holding down the shift and alt keys and tapping the hyphen key.

For example: Jost, Kenneth. "Census 2000." *CQ Researcher*, May 1, 1998, 385-408.

A non-breaking hyphen keeps the page number range together.

But by contrast: Jost, Kenneth. "Census 2000." *CQ Researcher*, May 1, 1998, 385-408. A regular hyphen allows the page number range to break at the end of the line.

Also see the section below on "Ellipsis."

## Footnotes vs. Endnotes

CRB prefers *endnotes* to cite sources and *footnotes* (marked by a symbol, such as an asterisk, \*) for other types of comments and related information—typically too detailed or off the main point to belong in the main text. It is best not to overuse footnotes (more than five or six in a paper is probably too many). For that matter, it is best not to overuse endnotes. If you have hundreds of notes, then maybe you need to rethink how you are using and citing your sources.

For a short paper with only a few source notes, it is preferable to place them at the bottom of the page or to put them in parentheses in the text, but this is a matter for the author's discretion.

## Multiple Authors

If two authors:

Smith, John, and James Miller.

If three authors:

Smith, John; James Miller; and Tim Williams.



*Semicolons* separate the names. That may seem like a trivial point, but the semicolons clearly separate names in a list, which commas do not.

Note that only the *first* author is shown last-name-first in the bibliography, as the first listed author's name is used for alphabetizing.

If there are more than three authors for a specific item, either list *all* of the names, as in the previous example, or use this style:

Smith, John, et al.  
*or*  
Smith, John, and others.

Pick one form (“et al.” *or* “and others”) and use it consistently in the paper. (I recommend “and others.”) Note the comma after author's first name in above box. Also note that there is no period after “et,” as it is a complete Latin word meaning “and.” See the section on Latin terms.

Where the name is in **first-name-first** order, as in a footnote or endnote, no comma is used after the name and before “et al.” or “and others”:

John Smith et al.  
*or*  
John Smith and others.

## Multiple Works by Same Author in Bibliography

Standard practice where a bibliography includes more than one work by the same author or authors is to list the names for the first one and to replace name(s) with a series of dashes for subsequent ones.

I recommend listing author(s) for each entry even when same as previous entry. The reason is that word processing allows items to be moved easily from one document to another. It is therefore a convenience to have all of the information for *each* item to facilitate reuse. In addition, if the researcher builds a working bibliography as the paper

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progresses, it is easy to move unneeded items to a "hold" file for future use or later reconsideration, as each item has all of the needed information.

**Ellipsis (omission within quoted matter)**

The ellipsis marker consists of three spaced periods, or "ellipsis points," indicating an omission within a quoted passage.

To indicate an omission use three (exactly three) SPACED periods. To be sure that the ellipsis points are not broken at the end of a line, use non-breaking spaces (shift-control-space). One often sees other forms (perhaps because some writers think that an omission is to be indicated by some random number of dots), but the proper format is three spaced periods.

If the omission comes at the end of a sentence, then there is a fourth dot (period), which is the period that ends the sentence. For example: "The quick brown fox jumped over . . . ." (Contrast that with: "The quick brown fox jumped over the . . . dog.")

Ordinarily, no ellipsis points should appear at the start of a quoted passage. However, if the quoted passage begins in the middle of a sentence and context calls for the first word that is quoted to begin with a capital letter even though it did not in the original, then place the letter in square brackets. For example: "[A]ll men are created equal . . . endowed by their Creator with certain unalienable Rights . . . among these are Life, Liberty and the pursuit of Happiness."

Omission of an entire paragraph or more is indicated by an entire line of spaced periods, with blank line before and after For example (quoting from the Declaration of Independence):

When in the Course of human events, it becomes necessary for one people to dissolve the political bands which have connected them with another, and to assume among the powers of the earth, the separate and equal station to which the Laws of Nature and of Nature's God entitle them, a decent respect to the opinions of mankind requires that they should declare the causes which impel them to the separation.  
.....

In every stage of these Oppressions We have Petitioned for Redress in the most humble terms: Our repeated Petitions have been answered only by repeated injury. A Prince whose character is thus marked by every act which may define a Tyrant, is unfit to be the ruler of a free people.

**Latin Abbreviations**

Avoid the traditional Latin abbreviations, as they are so often misused, misspelled, and misunderstood. Beyond that, a less academic-looking style may be better suited to our clientele.





In addition to “et al.” (“and others”) terms to avoid include: “e.g.” (use “for example” instead); “i.e.” (use “that is” instead); and “loc. cit.” and “op. cit.” Use a shortened form of the citation instead, as explained in the next section.

“Ibid.,” short for “ibidem,” meaning “the same,” is probably so familiar to most readers as to be ok, but it may be used *only* to refer to the source cited *in the immediately preceding note* and should be used only in endnotes, not in footnotes.

“Loc. cit.” (meaning “the place cited”) and “op. cit.” (meaning “the work cited”) have been formally banished under the University of Chicago style, and should not show up in CRB papers.

### Second and Subsequent References to a Source



As noted in the section on Latin abbreviations, CRB reports should *not* use “op. cit.” or “loc. cit.” To refer to a previously cited work, use a shortened form of the citation.

For example, where the work is first cited in this way (referring in this case specifically to pages 37-38):

<sup>12</sup>Alexander W. Astin, *What Matters in College? Four Critical Years Revisited* (San Francisco: Jossey-Bass, 1993), 37-38.

A later note (referring in this case to page 54) would cite the work this way:

<sup>23</sup>Astin, *What Matters in College?*, 54.

It is ok to use “ibid.” in an endnote to refer to (and *only* to) the work cited in the *immediately preceding* endnote. I recommend, however, that as you write and edit your paper you avoid using “ibid.” entirely. Instead use shortened citations, as shown above, because if you move material around it can quickly become impossible to know what “ibid.” referred to. If you like, as part of the final proofreading, where appropriate, “ibid.” can replace shortened citations (again: *ONLY* to refer to work cited in the immediately preceding note).



### “Non-sexist” Writing

Traditionally (that is, way back when *I* was in school), “he” was generally accepted as gender-free in such constructions as “When one drives long distances, he needs to take occasional breaks to get out of the car and stretch.” (An inelegant sentence, but you get the drift.) That is, it really meant anyone, not just a male. More recently, however, such constructions are viewed as “sexist”—that is, as encompassing only males, or as indicating bias. For that reason, many efforts have been made to find and use styles that avoid he/him/his constructions.

Approaches include the unfortunate use of "they" and "them" and "their" as if singular ("When one drives long distances, they need to take occasional breaks ..."). To those with an ear for the language, that is like scratching fingernails on a blackboard. That simile, of course, is likewise a throwback to when I was in school ... during the Eisenhower and Kennedy administrations, as blackboards have since gone the way of black art-deco dial telephones.

Be that as it may, it is nonetheless proper and expected that formal writing will avoid constructions that might be read as gender-specific where such is not really intended, that is, where the pronoun is a generic reference to "a person."<sup>13</sup>

Using "they" as if it were singular is simply NOT acceptable in formal writing. The "he/she" or "he or she" approach may be ok when used sparingly. For example, "When the taxpayer files electronically, he or she should print a complete copy of the return, sign it, and file it for reference." An occasional sentence of that type is acceptable. *However*, it is usually if not always possible and preferable to rewrite the sentence to avoid that construction. For example, recast the previous example as: "A taxpayer who files electronically should print a complete copy of the return, sign it, and file it for reference." The latter sentence makes precisely the same point as the former, but requires no "he," "she," or "they." Similarly, the sentence can be revised in this way: "Taxpayers who file electronically should print a complete ...." Or: "When taxpayers file electronically, they should ...." Making the subject plural often can unobtrusively correct the problem without changing the meaning.

I recommend that CRB researchers keep an eye out for questionable pronouns and seek to recast sentences to avoid inappropriate (that is, "sexist") uses. After a while, that becomes second nature.

Garner nicely summarizes the goal: "[U]nless you're involved in a debate about sexism, you'll probably want a style, on the one hand, that no reasonable person could call sexist, and on the other hand, that never suggests you're contorting your language to be nonsexist."<sup>14</sup>

### **Using "Heading Styles" and "Paragraph Styles" in Word**

Microsoft Word has some very helpful features that simplify formatting of documents and help to assure consistency. The two most useful are *headings* and *paragraph styles*. This is not the place for a detailed discussion of either of these features, but both deserve mention and a brief description.<sup>‡</sup>

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<sup>‡</sup> See <http://home.inreach.com/kumbach/ReportStarter.doc> and <http://home.inreach.com/kumbach/StartHere.doc> for a head start on formatting. Also see <http://home.inreach.com/kumbach/HeadingsInWord.doc> for some related information.

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### ***Heading Styles***

By using headings, you enable Word to build a table of contents automatically upon request. You have to click a few times to make it happen, but Word does most of the work. All you need to do is to keep an eye out for first, second, and third level headings (I would not recommend going beyond three levels, as a general practice), and to apply the appropriate style to each heading. Then from time to time have Word reinsert the table of contents to make sure that your structure makes sense.<sup>15</sup> If you don't know how to use heading styles or create a table of contents, please ask. Those features of Word are easily shown, but less easily explained in writing.

### ***Paragraph Styles***

Word lets you name a style for any kind of paragraph and modify it when you choose. When you modify a paragraph style, ALL paragraphs in that style in the document are instantly modified. For example, if you modify "Heading 1" to make the font larger and to put first level headings in a box with shading, then instantly ALL of your first level headings (Heading 1) are modified to the larger font, box, and shading. (A heading is also a type of paragraph. The difference between a heading and any other type of paragraph is that Word's table of contents function looks for headings, and it only recognizes those identified as Heading 1, Heading 2, and so on.) The key to making this useful is to consistently indicate the appropriate level for each heading (Heading 1, 2, 3, or 4) and to indicate any special paragraph style where you will want a consistent look, different from the normal style. You can also modify the "normal" style, of course.

Features of a style may include indents, hanging indents, space before and after the paragraph, justification, and so on. The style includes font (Times New Roman or Arial, for example), point size, bold, Italic, underline, and so on. This feature can be used in conjunction with heading styles—that is, you can specify the exact look of each heading style, as a heading is simply one kind of paragraph.

This paragraph, for example, has a .3" indent, .3" hanging indent, left justification, 1.5 line spacing, but otherwise is identical to the "normal" style (which includes Times New Roman 12 point font). I could, if it served a purpose, name this style and use it whenever this particular look is appropriate.

*This paragraph, in contrast, has a .3" indent, 0.0" hanging indent, left justification, Comic Sans MS 14 point italic font. I could likewise, if it served a purpose, name this style and use it whenever this particular look is appropriate.*

This paragraph has a .5" indent, no hanging indent, left justification, Times New Roman (12 point). In my papers, this one DOES have a name because it is the one I use for indented block quotations—it is just like the

normal paragraph style except for the half inch indent from the left. It saves a few keystrokes to click on the style "ssquote" (that is what I named it, for "single-spaced quote," a holdover from when papers were typically double spaced) rather than specify the indent.

Further discussion of this topic calls for hands-on demonstrations or for reference to a book on Word. It all sounds more complicated than it is after a little practice.

### **Type Size and Style (font)**

CRB's standard font for the text of reports is Times New Roman, 12 point. (A "point" in printing terminology = 1/72 inch. That is, 72-point type is one inch in height; 12-point type is one-sixth of an inch in height. And so on.) Headings may be in a larger type, and tables or other special situations may require smaller. First-level headings in this guide are 14 point, for example, to make them slightly more prominent than normal text.

Word's default for footnotes/endnotes is 10 point and no extra spacing between notes, but for endnotes I recommend 12 point with 6 points following each note for readability, although 11 point height is a good compromise. In any specific report, choices ultimately depend on what looks best for that report. Be consistent within any particular report.

### **Bulleted and Numbered Lists**

Bulleted lists and numbered lists are often useful and are made easy in Word. Use a numbered list when the order is important (for example, the ten leading California agricultural products, in order of dollar value). Use a bulleted list when the order is arbitrary or not the focus of attention.

A bulleted list can serve as an alternative to an additional level of headings where the topics need only brief attention.

If the bulleted items include sentences then ALL in the same list should be written as sentences, with end punctuation (period usually, or question mark if a list of questions). If all of the items are phrases, then no end punctuation is needed. See Turabian's *Manual*, §3.57.

Lay out items in a list consistently—use parallel forms: all full sentences or paragraphs, or all phrases, or all questions, and using parallel verb form. This is the sort of thing that should be routinely checked and revised as necessary during editing.

Lists may be single-spaced, double-spaced, or spaced in some other way (for example, 6 points, or half a line, between items), but be consistent. This (in my experience) is a matter of what looks right under the circumstances. Single spacing seems appropriate for very short items, while a full or half line between items (12 or 6 points) seems preferable when each item is several lines in length. This is a judgment call, and in some cases may be affected by page breaks or other layout issues.

## Run-in Headings

As an alternative to a regular heading (like the one above), you might consider run-in headings, especially for a third or fourth level in the outline. Run-in headings look like this (adapting this paragraph to provide part of the example):

**Run-in Headings.** As an alternative to a regular heading (like the one above this subsection, which is Heading 2), you might consider run-in headings, like the one beginning this paragraph, especially for a third or fourth level in the outline. They are not appropriate for headings that you want to show up in the table of contents.

The heading words are simply bolded and followed by a period (also in bold). A run-in heading will, of course, not show up in a Word-generated table of contents, as the paragraph is "Normal" style. Run-in headings are probably most useful when the subsections to which they apply each encompass one to a few paragraphs. Here again, there is a matter of judgment—consider the paper as a whole when deciding on headings and their formatting during final editing.

## Blank Pages

If you wish to have chapters or major sections start on a right-side (odd-numbered) page, make the facing page completely blank (**no footer or header, just blank**) if it does not have text from the preceding chapter or section. That can be done in Word with an odd-page section break. It may be best not to start chapters only on odd-numbered (right side) pages, however, but instead to let them start where they fall. That saves on paper when reports are printed, especially for papers under, say, 100 pages.

## A Caution about Plagiarism<sup>16</sup>

In December 2000, a *San Jose Mercury-News* intern with a degree in journalism was fired for plagiarism in published stories. More recently, historians Stephen Ambrose and Dorris Kearns Goodwin have been found to have plagiarized in some of their published works. When it is discovered, plagiarism draws unfavorable publicity, if not more severe consequences, even if the writer really did not understand that he or she was plagiarizing or that it was wrong to do so.

Plagiarism is the use of another person's *words* or *treatment of ideas* without giving credit. Plagiarism is a type of theft, and it is a serious violation of academic ethics. It may also result in serious penalties. Plagiarism includes:

1. Using another writer's words as though they were one's own
2. Using another writer's arrangement of ideas, organization of material, or set of ideas or topics as though it were one's own

Mere rearranging of phrases or minor paraphrasing is not enough to avoid plagiarism. Nor is citing the source while failing to put quoted matter in quotation marks (or block indentation form).

There is nothing wrong with using another writer's words or arrangement of ideas *as long as proper credit is given to the original author* and within limits of “fair use,” which restricts quotation of copyrighted matter. Proper credit includes the use of quotation marks or block form (indentation and single spacing) for quoted material. It also includes citing the source of the information even when the author is not being quoted directly.<sup>17</sup>

Do not just change a word or two or make other such minor changes and try to claim the material as your own work or as your summary or discussion of the ideas of the author. As Booth, Colomb, and Williams point out, “You also plagiarize when you use words so close to those in your source, that if your work were placed next to the source, it would be obvious that you could not have written what you did without the source at your elbow.”<sup>18</sup>

When you use the ideas of another author, give credit—cite the source. When you use a set of categories or an analytical scheme developed by someone else, give credit—cite the source.

For publication, you must also obtain permission of the copyright holder to use copyrighted material in excess of short passages covered under “fair use” rules.

For a more complete discussion of plagiarism, see “The Pitfall to Avoid at All Costs,” in Booth, Colomb, and Williams, *The Craft of Research*.<sup>19</sup>

## Freestanding Bibliographies

### Background

CRB’s public policy bibliographies of 1998 and 2000 were unusual in that the Library assembled a full set of the listed documents for use by staff and clients in the Legislature. Those projects were also unusual in that they were CRB-wide undertakings. They were comprehensive in scope, covering a wide range of subjects with contributions from many staff members and edited into a single document.<sup>20</sup>



One of the purposes of *The CRB Style Guide* is to make preparation of the next comprehensive public policy bibliography go more smoothly, since everyone should be using the same formats and should be alert to the things that tripped the Bureau up last time. In general, the guide proved helpful in preparation of the 2003 edition of the bibliography, which is pending publication as of late December, 2002.

The 2000 edition (published in March 2001) was not given final edits because of time constraints, so it has some inconsistencies and errors. However, the 2003 edition had

more complete editing and is generally a decent guide to formatting and is relatively consistent. Not perfect, but not too bad.

### **Annotated Bibliographies**

From time to time, the Bureau issues annotated bibliographies on a California public policy topic or other subject of special interest to our clientele. We did so in 1996, for example, with Patricia de Cos's *A Selected and Annotated Bibliography on California's Central Valley by Geographic and Subject Theme*. In September 2000, CRB published *The World War II Japanese American Incarcerations: An Annotated Bibliography of the Materials Available in the California State Archives*, by Karen Origel and Anne Woo-Sam.

It makes sense to publish an annotated bibliography when the topic involved substantial research and is of enough interest to make an annotated bibliography useful to our audience, even if the research did not result in a published paper. The annotations—comments on each entry in the list—help to make the bibliography really valuable.

I generally build my bibliography, including annotations, while I research and write a paper, not as an afterthought. In that way, whatever becomes of the paper, at least there is one product—an annotated bibliography—to keep for reference or for a future paper, or to publish for others to use. This technique of creating the bibliography as the paper progresses, which I *strongly* recommend, eliminates last-minute rushing around to find and document sources and prevents the errors to which a last-minute approach is prone. It likewise pays to edit (rewrite, spell check, reorganize) as the paper progresses, leaving only an overall edit for the end.

By way of example, here are some annotated bibliography entries from the 1998 edition of *California's Great Central Valley: A Statistical Tour*. The comments (annotations) are brief, but should help the reader decide whether to obtain the item.

Barich, Bill. *Big Dreams: Into the Heart of California*. N.Y.: Pantheon Books, 1994. A personal journey across much of California.

Bean, Walton, and James J. Rawls. *California: An Interpretive History*, Seventh Edition. N.Y.: McGraw-Hill, 1997. A highly regarded history.

Clarke, Thurston. *California Fault: Searching for the Spirit of a State Along the San Andreas*. N.Y.: Ballentine, 1996. A personal view, centered on the fault zone. Clarke is much more cynical and less sympathetic to California and the people he meets along his journey than is Bill Barich in *Big Dreams*.

de Cos, Patricia L. *A Selected and Annotated Bibliography on California's Central Valley by Geographic and Subject Theme*. Sacramento: California Research Bureau, 1996. This is a wide-ranging and well organized guide to literature and documents about the Central Valley. There is something here to meet every interest.

Haslam, Gerald. *The Other California: The Great Central Valley in Life and Letters* [expanded and revised edition]. Reno: University of Nevada Press, 1994. Essays on the physical, historical, and social landscape of the Valley.

Haslam, Gerald W., ed. *Many Californias: Literature from the Golden State*. Reno: University of Nevada Press, 1992. Anthology of fiction and non-fiction.

Yogi, Stan, ed. *Highway 99: A Literary Journey Through California's Great Central Valley*. Berkeley: Heyday Books, 1996. Anthology of fiction and non-fiction.

Walters, Dan. *The New California: Facing the 21st Century*, 2nd Edition. Sacramento: California Journal Press, 1992. The *Sacramento Bee* columnist's observations on the state. Chapter 12 covers the San Joaquin Valley. Other chapters touch on other parts of the Central Valley.

As for future major (CRB-wide) bibliographies, whether simple lists or annotated—the key will be to plan and prepare. This means that everyone should be aware of the due dates and careful to be accurate. It also means that everyone should stick to the formats outlined in this guide and in Kate Turabian's *Manual of Style*.

### **Examples**

The following have been selected more or less randomly from the 2000 policy bibliography (published by the Bureau in 2001). These examples illustrate several typical types of source. The published bibliography—or preferably the 2003 edition—provides ample additional examples.

#### ***Books, Articles, Reports***

Some of these do not necessarily fit into neat categories, and some include *ad hoc* adaptations for clarity. Any of them would pass muster in one of our papers.

California. Assembly Committee on Housing and Community Development. *Doling out the Bonds: California's Use of Tax-Exempt Bonds for Affordable Housing. Interim Hearing Briefing Paper*. November 16, 1997. Sacramento: the Committee, 1997.

California. Assembly Local Government Committee. *The Challenge of Achieving Jobs-Housing Balance in California in the 21st Century*. Sacramento: the Committee, March 1999.

U.S. Department of Housing and Urban Development. "Treasury Joins HUD in Co-Chairing Predatory Lending Task Force" (HUD press release HUD No. 00-75), April 12, 2000. <http://www.hud.gov/pressrel/pr00-75.html>

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Eccles, Jacquelynne S. "The Development of Children Ages 6 to 14." *The Future of Children: When School is Out* 9, no. 2. Los Altos: The David and Lucille Packard Foundation, Fall 1999.

Halfon, Neal; Roberta Gonzales; and Miles Hochstein. *Building Bridges for California's Young Children: A 12-Point Agenda to Enhance Proposition 10*. CPRC Report. Los Angeles: California Policy Research Center, 1999.

Illig, David C. *Birth to Kindergarten: The Importance of the Early Years*. Sacramento: California Research Bureau, California State Library, February 1998.

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Family Violence Prevention Fund (FVPF). *Approaches to Child Abuse and Domestic Violence: Working Together to Make Peace at Home*. San Francisco: FVPF, 1999.

Moore, Kristin Anderson, and Sharon Vandivere. *Stressful Family Lives: Child and Parent Well-Being*. Child Trends and The Urban Institute, New Federalism National Survey of America's Families. Washington, D.C.: The Urban Institute, June 2000.

National Alliance for the Mentally Ill (NAMI). *Families on the Brink: The Impact of Ignoring Children with Serious Mental Illness: Results of a National Survey of Parents and Other Caregivers*. Chicago: NAMI, July 1999.

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California. State Auditor. *California's Department of Transportation: Has Improved Its Process for Issuing Permits for Oversize Trucks, but More Can Be Done*. Sacramento: the Auditor, May 2000.

Garvey, Megan. "A Bridge Too Low, Far Too Often." *Los Angeles Times*, August 22, 1999, Orange County Edition.

Garvey, Megan. "State Fails to Keep Pace With Oversized Truckloads." *Los Angeles Times*, October 21, 1999, Home Edition.

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Altbach, Philip G.; Robert O. Berdahl; and Patricia J. Gumpert, editors. *American Higher Education in the Twenty-first Century: Social Political, and Economic Challenges*. Baltimore: The John Hopkins Press, 1999.

Astin, Alexander W. *What Matters in College? Four Critical Years Revisited*. San Francisco: Jossey-Bass, 1993.

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Broad, Molly Corbett, and others. *The Cornerstones Report*. Long Beach: California State University, Office of the Chancellor, December 1997.

[http://www.calstate.edu/cornerstones/reports/cornerstones\\_report/index.html](http://www.calstate.edu/cornerstones/reports/cornerstones_report/index.html)

Immerwahr, John, and Tony Foleno. *Great Expectations: How the Public and Parents—White, African American and Hispanic—View Higher Education*. San Jose: The National Center for Public Policy and Higher Education, May 2000.

Leslie, Larry L., and Paul T. Brickman. *The Economic Value of Higher Education*. New York: Macmillan Publishing Company, 1988.

### ***Web Sites***

*State the name or brief, clear description of the site, followed by the URL. Do NOT just plop the naked URL into the bibliography. Examples below are plucked from three sections of the 2000 bibliography. (I have selected only a few from each section to use as examples. See the published edition of the bibliography for the rest.) The researcher may, of course, add comments where they would be helpful to the reader.*

#### **Sites relating to native American affairs:**

Bureau of Indian Affairs, <http://www.doi.gov/bureau-indian-affairs.html>.

Indian Law, [http://www.pechanga.net/indian\\_law.htm](http://www.pechanga.net/indian_law.htm).

Treaty Rights, Understanding the Conflict (University of Minnesota),  
<http://www.fw.umn.edu/indigenous/>.

#### **Sites relating to housing:**

California Association of Realtors, <http://www.car.org/>.

California Department of Housing and Community Development,  
<http://www.hcd.ca.gov/>.

California Redevelopment Association, <http://www.ca-redevelopment.org/>.

U.S. Department of Housing and Urban Development, Office of Housing,  
<http://www.hud.gov/fha/fhahome.html>.

#### **Sites relating to regional development issues:**

California Central Coast Marketing Group, <http://www.ca-central-coast.org>.

California State University, Chico, Center for Economic Development,  
<http://www.csuchico.edu/cedp>.

Joint Venture Silicon Valley Network, <http://www.jointventure.org>.

NorCal Industrial Development Executives Association, <http://www.norcalidea.org>.

San Francisco Bay Area Marketing Partnership, <http://www.bayareafirst.org>.

## Suggested Reading and References

The 1918 edition of *The Elements of Style*, William Strunk, Jr.'s classic guide to writing, is available on the Web (<http://www.bartleby.com/141/>). *It is well worth your time*. A revised and expanded edition, co-authored by writer E. B White, has been in print for many years.<sup>21</sup> (The version of *The Elements of Style* posted on the Web is out of copyright and may be freely reproduced.) This little book, perhaps the most famous and honored book on writing ever published, belongs in the library of every writer, preferably dog-eared and marked up from reading and reference (the book, not the writer).

I also *highly* recommend William Zinsser's wonderful book *On Writing Well*, now in its sixth edition.<sup>22</sup> This may well be the world's best book on clear, effective writing. Part I, which only runs 50 pages or so, is essential reading, a short course in clear writing. The rest of the book focuses on particular topics, such as interviews, travel writing, business writing, and so on. The whole book is valuable, but the first part is the most important because it applies to all kinds of writing.



### Recommended references

Bates, Jefferson D. *Writing with Precision: How to Write So That You Cannot Possibly Be Misunderstood*. NY: Penguin Books, 2000. This is a new and expanded edition of a book first published by Acropolis Books in 1978. Good book. I should read it again and pay closer attention.

Booth, Wayne C.; Gregory G. Colomb; and Joseph M, Williams. *The Craft of Research*. Chicago: University of Chicago Press, 1995. This is a clear and valuable explanation of how to do research and write a research paper. Even those with much experience can learn from it.

*Chicago Manual of Style*, 14<sup>th</sup> Edition. Chicago: University of Chicago Press, 1993. This manual covers much more than footnoting, bibliographies, and other matters of style and documentation. Much of the book is intended for writers and others working specifically with the University of Chicago Press. The parts that are essential to CRB are addressed in Turabian's *Manual for Writers*. For surprisingly amusing Q&A on the *Chicago Manual*, see "The Chicago Manual of Style FAQ (and not so FAQ)," <http://www.press.uchicago.edu/Misc/Chicago/cmofaq.html>. "FAQ" is short for "frequently asked questions." (Note: the *Chicago Manual* is now in a 15<sup>th</sup> edition.)

CITING LEXIS ONLINE DATABASE, Footnotes and Bibliography Series, Lehigh University: <http://www.lehigh.edu/~inhelp/footnote/lexis.html>. Provides a few specific examples.<sup>23</sup>

Connolly, William G., and Allan M. Siegal. *New York Times Manual of Style and Usage*, revised and expanded edition. New York: Times Books, 1999. This book answers many questions about use of specific words and phrases. The alphabetical arrangement and concise approach make it easy to use. Highly recommended. It does not duplicate or overlap the content of Turabian's *Manual* or the *Chicago Manual of Style*. The *New York Times* book focuses on use of words and phrases. It is a traditional guide for newspaper writers, but valuable for all writers. The others focus on layout and documentation for academic writing. This is a quick and appropriate means for finding preferred usage (but also see Ritter, below).

Einsohn, Amy. *The Copyeditor's Handbook: A Guide for Book Publishing and Corporate Communications*. Berkeley: University of California Press, 2000. This is directed to copyeditors, not writers, but it will be of interest to those who do both or who want an introduction to that type of editing. The "Checklist of Editorial Preferences," pp. 421-29, summarizes the kinds of decisions that have to be made in order to assure consistency throughout a publication or across all publications.

Garner, Bryan A. *A Dictionary of Modern American Usage*. N.Y.: Oxford University Press, 1998. This book encompasses "word entries, which discuss a particular word or set of words," and "essay entries, which address larger questions of usage and style." In over 700 pages, Garner has a lot of room to roam, so the book is a valuable resource, meticulously researched and thoughtfully written. The book is more scholarly and comprehensive than the *New York Times Manual of Style*. It is highly recommended as a resource and for occasional browsing to alert the reader to kinds of usage questions to watch for. (Or "for which to watch," if you want to be persnickety.)

Masterson, Pete. *Book Design and Production: A Guide for Authors and Publishers*. El Sobrante, California: Aeonix Press, 2005. This will be a valuable guide for those who aspire to go beyond the limited capacities of Word for layout. Masterson is an experienced book designer. Chapter 8 discusses Word as a layout program for those who use it (or who have no better option available) despite its limitations.

*Merriam-Webster's Dictionary of English Usage*. Springfield, MA: Merriam-Webster, 1994. This is a comprehensive work, comparable to Garner's *Dictionary of Modern American Usage*, but is an edited work, not the work of a single author. It is also highly recommended for reference and browsing. See the entry under "that" for an example of its usefulness and comprehensiveness in treating a thorny topic.

Ritter, R. M., editor and compiler. *The Oxford Dictionary for Writers and Editors*, second edition. N.Y.: Oxford University Press, 2000. Entries are brief, but numerous. The

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book is valuable for a quick check on usage or spelling, and not likely to distract in the way that the Garner book or the Merriam-Webster usage dictionary can.



Turabian, Kate. *A Manual for Writers of Term Papers, Theses, and Dissertations*, Sixth Edition. Revised by John Grossman and Alice Bennett. Chicago: University of Chicago Press, 1996. This is the latest edition of a classic guide to formatting and documentation. This edition conforms Turabian's style to the much bulkier *Chicago Manual of Style*, 14<sup>th</sup> Edition. **This is highly recommended as a reference for CRB researchers.**

#### Also of interest

McAdams, Mindy, "Copy Editing for Magazines," <http://www.well.com/user/mmcadams/reference.html>. Much here should be useful to writers. Also see the related file "Words about Words," <http://www.well.com/user/mmcadams/words.html>. The focus is on magazine writing, but the principles apply to CRB as well.

Richardson, Peter. *Style: A Pragmatic Approach*. Boston: Allyn and Bacon, 1998. This brief book is intended for students of writing (Richardson taught at the University of North Texas). It includes Richardson's discussion of an approach to style that reflects conversational norms (that part is about 60 pages) and a selection of readings, plus sample answers to selected exercises and a glossary. The book serves as both tutorial and example: Richardson demonstrates the points he makes in his own clear, readable writing. In that way the book is similar to Zinsser's *On Writing Well*, a book Richardson cites as being among his sources and influences. Richardson is now a communications analyst for the Public Policy Institute of California.

Vidoli, Carol A. *Technical Report Writing*, NASA Technical Memorandum 105419 (last update 2005); <http://grcpublishing.grc.nasa.gov/editing/vidoli.CFM>. This should be of value to CRB authors, even those who are relentlessly nontechnical. *Note: URL updated and this entry revised November 15, 2005.*

Other helpful books range from Theodore Bernstein's famous (and long out of print) *The Careful Writer: A Modern Guide to English Usage* to Hank Nuwer's intriguing *How to Write Like an Expert About Anything*, the title of which neatly encompasses what we at CRB have to do. If nothing but a hackneyed phrase will quite hit the nail on the head, try *The Dictionary of Clichés*, by James Rogers. Most entries will ring a bell.

## Notes

<sup>1</sup> Amy Einsohn, *The Copyeditor's Handbook: A Guide for Book Publishing and Corporate Communications* (Berkeley: University of California Press, 2000), 14.

<sup>2</sup> Scholarly folks appreciate freedom from clutter, too. For an excellent example of a scholar who makes a point of writing for flow and readability, consciously avoiding footnotes and other interruptions of the narrative, see John McWhorter's book *Losing the Race*. I mention this book particularly because the author comments explicitly at one point on his practice of avoiding footnotes and other distractions. McWhorter, a professor of linguistics with a very fine eye and ear for the language, provides endnotes to cite sources where necessary, but, in a style that seems to be growing in popularity, does not use superscripts in the text. Rather, the notes, appearing after the text, are keyed to page numbers within the text. The Library of America uses the same approach in its extensive series of books, keying explanatory notes at the end of each volume to page and line numbers, not cluttering the text with superscripts or footnotes. The reader does need to glance at the endnotes from time to time, but is relieved of distracting superscripts and footnotes.

<sup>3</sup> The Brookings Institution, in whose "Guidelines for Authors" I found that recommendation, has "verifiers" who use the research materials file in conjunction with their processing of a draft. Brookings requires the maintenance of a file of research materials. CRB does not have a staff of verifiers (we should BE so lucky), but the process must nonetheless be done in some fashion, if not by the researcher personally then by others in the office prior to publication. By the way, please note, it is Brookings *Institution*, not "Institute."

<sup>4</sup> It is a convenience for later revision to include the call number in hidden text in the bibliography. If a book has been obtained through interlibrary loan, it is appropriate to photocopy pertinent portions for the working file, as it could take weeks to obtain the book again. This is a judgment call for the researcher if the copying would be inconveniently lengthy.

<sup>5</sup> If you then obtain the print version of the article or other source, you should cite that, after double-checking the accuracy of what you are quoting or otherwise citing. The fact that the Web site helped you to locate the article is irrelevant once you have the print source in hand.

<sup>6</sup> If you have used a newspaper or other periodical over a period of time as general background and information for a paper, then list the periodical in the bibliography in that way. For example: *Fresno Bee*. March - May 1998.

<sup>7</sup> The 2000 bibliography project put title first for editorials, treating them as articles without a byline. If I had had time to do a final edit on the bibliography, I would have revised all of them into the format suggested here, so that the publisher (the newspaper) would be treated as author.

<sup>8</sup> Kate Turabian, *A Manual of Style for Writers of Term Papers, Theses, and Dissertations*, Sixth Edition (Chicago: University of Chicago Press, 1996), §8.30.

<sup>9</sup> This section is reproduced from my *Low-Tech Research in a High-Tech World: How to Do Research Without the Internet and Even Without a Word Processor*, 1997 (available at <http://home.inreach.com/kumbach/lowtech.pdf>). That is an updated edition of something that was informally and privately published in 1984 and greeted with indifference from coast to coast. It is an antique, but still has some helpful principles.

<sup>10</sup> The abbreviation “p.” or “pp.” to indicate page or pages is usually omitted in notes to reduce clutter, but should be included when omission might be confusing. That is why in the Kaufman/Oleon example’s note it is “p. 6” after “1967,” not just “6.” The abbreviation “p.” is not needed for clarity after “(NY: AMACOM, 1974)” because it is obvious that 133 is a page number. This, I grant you, is slicing the baloney pretty thin, but it seems to me to be a reasonable approach.

<sup>11</sup> Some of what is in my CRB paper about the Internet (*The Internet: A California Policy Perspective*) and my papers about computer technology in schools is of this type.

<sup>12</sup> This is a revision as of October 2005, a belated revision to recognize the standard in word-processed documents. The two-space rule that many folks remember dates back to the days of fixed-font typewriters. My stick-in-the-mud insistence on two spaces was out of touch and I have now appropriately abandoned it.

<sup>13</sup> Unfortunately, an excess of gender neutrality occasionally leads to such atrocities as "When one is diagnosed with prostate cancer, they must choose an appropriate form of treatment in consultation with their doctor."

<sup>14</sup> Bryan A. Garner, *A Dictionary of Modern American Usage* (N.Y.: Oxford University Press, 1998), 594, under the entry for "Sexism."

<sup>15</sup> To insert a table of contents, put the cursor where you want the TOC to be placed, then click Insert on the tool bar, then click Tables and Indexes, then click the Table of Contents tab, then pick the options you want and then click OK.

<sup>16</sup> This section is adapted from my *Low-Tech Research in a High-Tech World*.

<sup>17</sup> General knowledge (dates of presidential administrations, that men first set foot on the moon in 1969, and so on) does not require a source citation. Neither (although this gets tricky) does information on which you, the author, are an expert. For example, I can assert without a source citation or other documentation the general observation that teachers vary widely in their expertise and level of comfort with educational technology because I invested months in communicating with teachers and in reading a wide range of formal and informal reports relating to that subject. It is something I know, and therefore I need not point out a particular source to back up the assertion. Someone with no real expertise in the issue might, however, do well to cite a source. But if I were to assert that (to make up an example) 65 percent of California's credentialed teachers feel the need for additional training in the classroom use of computers and Internet resources in order to use them effectively, then I would need to document the source of the data, as something of that specificity calls for attribution—not to mention that different sources might have come up with different figures, so it is important to know where I got the information.

<sup>18</sup> Wayne C. Booth, Gregory G. Colomb, and Joseph M. Williams, *The Craft of Research* (Chicago: University of Chicago Press, 1995), p. 167.

<sup>19</sup> See *The Craft of Research*, pp. 166-70, or Joseph Gibaldi and Walter S. Achtert, *MLA Handbook for Writers of Research Papers*, Third Edition (N.Y.: Modern Language Association, 1988), §1.6.

<sup>20</sup> The 2000 bibliography, prepared for the CAPITOL Institute, was published by the Bureau as *California Public Policy Bibliography 2001*, by Staff of the California Research Bureau, California State Library. The bibliography has some inconsistencies and possible errors that limited time did not allow to be ironed out, but it still provides numerous examples.

<sup>21</sup> William Strunk, Jr., and E. B. White, *The Elements of Style*, 4<sup>th</sup> edition (New York: Allyn and Bacon, 2000). A bargain still, at \$7.95.

<sup>22</sup> William Zinsser, *On Writing Well*, 25<sup>th</sup> Anniversary Edition (New York: Harper Resource, 2001). This, too, is a bargain at \$14.00. I have been recommending this book since its first edition, published in 1976 (it has been through about six editions, growing a bit larger with each).

<sup>23</sup> Additional links to help with electronic source citation may be found at : "Karla's Guide to Citation Style Guides": <http://bailiwick.lib.uiowa.edu/journalism/cite.html>.