

PN-ABP-259
ISBN 82715

Preparing AFR/ARTS Publications

Basic Editorial Guidelines for EA, FARA, and HHR Staff and Collaborators

For use by USAID/AFR/ARTS staff and collaborators
in preparing reports and other publications

(Based on U.S. Agency for International Development, Center for Development
Information and Evaluation. 1988. *Publications Style Guide*.
Washington, D.C.: USAID.)



Office of Analysis, Research, and Technical Support
Bureau for Africa
U.S. Agency for International Development

Preparing AFR/ARTS Publications

Basic Editorial Guidelines for EA, FARA, and HHR Staff and Collaborators

The following guidelines are intended for all publications produced by the divisions of USAID/AFR/ARTS (EA, FARA, HHR) and their collaborators. Most of the guidelines are applicable to all ARTS publications. However, staff and collaborators should note that some of the guidelines apply to a specific division; these guidelines are signified by underlining the division name (e.g., ARTS/FARA). These guidelines are intended to help ensure that AFR/ARTS publications communicate their messages effectively and are editorially consistent.

AFR/ARTS Collaborator and Staff Responsibilities

- 1) AFR/ARTS collaborators are responsible for basic word processing, copy editing, and proofreading of publications produced under their contracts. Copies of edited drafts should be delivered to the appropriate AFR/ARTS project manager. In addition, for publications prepared for ARTS/FARA, edited drafts should be sent to the division's Publications / Dissemination Specialist (PDS). The project manager and/or PDS will review these drafts to ensure adequate compliance with the editorial guidelines detailed here. If a submitted draft is not sufficiently compatible with these expectations, the project manager and/or PDS may return it to the collaborator for further editing.
- 2) AFR/ARTS collaborators are expected to provide final copy of any publications they produce not only in manuscript form but also on an electronic disk in a PC-compatible word-processing (e.g., WordPerfect 5.1) or ASCII format. This is true regardless of whether a contract is providing printed and bound reports, camera-ready unprinted copy, or edited manuscript ready for desktop publishing. All collaborators should understand that AFR/ARTS has the right to reprint (in whatever form it chooses) any report funded in whole or in part by AFR/ARTS. (Publications funded by USAID, as a government agency, cannot be copyrighted by AFR/ARTS or its collaborators.)
- 3) When an ARTS/FARA publication is being produced in house (rather than by a collaborator), the PDS (or a consultant working under his/her guidance) is responsible for copy editing and proofreading. ARTS/FARA staff are expected to give the PDS sufficient advance notice of forthcoming editorial needs. The PDS should be the last person to edit any manuscript before it is finalized, to avoid editing sections that may be heavily rewritten or eliminated during the review process.
- 4) The AFR/ARTS Director, a Division Chief, project manager, PDS, or other appropriate staff may occasionally feel that a project's message/goal could be enhanced by preparing a publication in a form other than (or in addition to) the standard AFR/ARTS technical report format or a separately published executive summary. In such situations, the project manager, PDS, other staff, and collaborators may be expected to work together to explore publication options. The AFR/ARTS Director, a Division Chief, or his/her designee will be responsible for granting or denying approval of any alternative publishing format.
- 5) The official style manual for AFR/ARTS publications—whether produced in house or by collaborators—is the *Publications Style Guide* of the USAID Center for Development Information and Evaluation (CDIE) (1988). This style guide is based on the *U.S. Government Printing Office Style Manual* (1984), with bibliographic style adapted from the *Chicago Manual of Style* (1982) and with additional statements of USAID-specific preferences. A copy of the CDIE style guide should be attached to these AFR/ARTS guidelines. If one is not, ARTS/FARA staff and collaborators can obtain a copy by consulting the ARTS/FARA PDS. ARTS/EA and HHR staff and collaborators can obtain a copy through CDIE.

Specific exceptions to the CDIE style guide are noted under various subheadings below. In addition, the following chapters / sections of the CDIE guide should be disregarded; they are not relevant to publications produced for AFR/ARTS:

- 1. *Introduction*: entire chapter.
- 2. *Report Preparation*: sections 2.1/Authors' Responsibilities; 2.2/Editorial Review; 2.3/Report Production (BUT do consider sections 2.4/Composition and 2.5/Other Style Guides).
- 3. *Report Organization*: entire chapter. Instead follow the guidelines below.

Report Organization

- 6) Rather than using the organizational guidelines contained in Chapter 3 of the CDIE Style Guide, the following guidelines should be followed.

Cover

- Covers of all reports funded in whole or in part by AFR/ARTS should prominently acknowledge that fact. Specifically, front covers of final reports—whether produced in house or by collaborators—should contain the USAID name (“U.S. Agency for International Development”) and logo if the reports are to be distributed outside USAID. When reports do not contain a separate title page, the cover should acknowledge AFR/ARTS, using its full name including the name of the appropriate division (EA, FARA, or HHR; see below under “Title Page”). Also when there is no separate title page, covers should include the USAID project number. Proposed covers should be included with the edited drafts sent to the appropriate AFR/ARTS project manager (and, for FARA, the PDS) for review. If a report is to be published as part of the ARTS Technical Papers series, the standard AFR/ARTS cover and typefaces should be used and a publication number should be assigned for inclusion on the cover. If this is not certain at the time of report preparation, the AFR/ARTS project manager should be contacted to see if a decision will be made in time for the AFR/ARTS cover to be applied.

Front Matter

- Front matter (title page through executive summary) should be numbered with lower-case

Roman numerals. No numeral should be typed onto either the title page or the page on its reverse; however, these pages should be counted as “i” and “ii.”

- Front matter should appear in the following order: title page, Contents, Foreword, Acknowledgments, Preface, Glossary of Acronyms and Abbreviations, Executive Summary.

Title Page

- Like the covers, title pages of all reports funded by AFR/ARTS should prominently acknowledge that fact. Specifically, title pages—whether produced in house or by a collaborator—should contain the USAID project number, logo, and complete name (i.e., Agency, Bureau, Office, and Division levels):

Division of Economic Analysis, *OR*

Division of Food, Agriculture, and Resources Analysis

[NOTE: serial comma is used; “Resources” is plural], *OR*

Division of Health and Human Resources

Office of Analysis, Research, and Technical Support
Bureau for Africa

U.S. Agency for International Development

As with covers, proposed title pages should be included with the edited drafts sent for review to respective AFR/ARTS project managers (and, for FARA, the PDS).

Table of Contents

- The table of contents should be given a standard chapter heading saying only “Contents.”
- The table of contents should include all chapter headings, first- and second-level subheads, boxes, figures, and other titled graphics.

Foreword

- When a report is prepared by a collaborator, AFR/ARTS may choose to include a foreword written and signed by an AFR/ARTS staff person. At the discretion of AFR/ARTS, this may be in addition to or instead of a preface submitted by a collaborator. Collaborators should check with the AFR/ARTS project manager (or, for FARA, the PDS) to see if such a foreword is planned for a specific report. If a foreword is

planned, the collaborator should include it in the table of contents and, in numbering, should leave two blank pages (front and back) for the foreword's insertion.

- As the CDIE style manual explains (section 3.2.3), "a foreword is an introductory note written by someone *other* than the author. Introductory notes by the author should be contained in the preface."

Acknowledgments

- Inclusion of an acknowledgments section by an author may be requested by AFR/ARTS or may be left to a collaborator's discretion. If a report does contain an acknowledgments section, AFR/ARTS should be among the parties prominently acknowledged. The complete AFR/ARTS name, including division name (see above under "Title Page"), should be used.

Preface

- As the CDIE style manual explains (section 3.2.6), "Any introductory or incidental notes by the authors should be included in the preface. Material essential to an understanding of the text or a discussion of methodology should not be placed in the preface."

Acronyms and Abbreviations

- Publications with extensive use of acronyms and other abbreviations in textual and/or tabular material should include a "Glossary of Acronyms and Abbreviations" following the table of contents and preceding the executive summary. In addition, as stipulated in the CDIE style guide (section 5.1.1), "abbreviations should be defined anew in each major section of the report (i.e., front matter, main body, and each appendix) or if a subsequent reference appears some distance from the original reference."

Executive Summary

- Publications should contain an executive summary capable of standing alone as a separate document. This summary should concisely and effectively present the key issues, methodologies, findings, recommendations, etc., of the complete report. It should not be written as if it

were a foreword, preface, or introduction. For example, instead of saying in an executive summary "This report demonstrates that conservation is an important issue," say simply "Conservation is an important issue." Do not say something like "This issue is explained below," unless the subsequent explanation is within the executive summary, not the body of the report.

Body of the Report

- Arabic numerals should be used for paginating the main body of a report, beginning with the "Introduction," "Chapter 1," etc.

Appendixes

- Use the American spelling: "appendixes."
- Multiple appendixes should be delineated with letters (e.g., "Appendix A").

Footnotes

- As the CDIE style manual explains (section 3.5), "Any explanatory notes or clarifying details helpful to an understanding of the text but nonetheless digressive in nature should be placed in a footnote at the bottom of the page that contains the text to which it refers." Footnotes should be indicated in the text with superscript Arabic numerals. Contrary to what the CDIE style manual says, numbering should begin anew with each front-matter section, chapter, or appendix.

References Cited / Bibliography

- Complete references for all citations should be included at the end of the report (following any appendixes). See the CDIE style guide, section 4.6/References and Bibliography, for style preferences. If this section lists only publications cited in the report, it should be called "References Cited." If it contains both cited and uncited publications, it should be called "Bibliography."

Format

- 7) Chapter 4 ("Format") of the CDIE style guide should be followed for matters concerning pagination, heads and subheads, tables and figures, listings, references, etc. However, the following exceptions to

CDIE style should be observed:

- Disregard section 4.1/Word Processing Formats. (The CDIE guidelines were prepared before PC-based word-processing was widely used.) Instead:
 - Use a standard, proportionally spaced, serifed font (such as Times Roman) if camera-ready copy is being prepared.
 - Center page numbers at the base, not the top, of a page.
 - Make paragraph indentations with the computer keyboard's tab key, not by hitting the space bar five times.
- Contrary to section 4.2/Pagination, appendixes and the references/bibliography should be numbered consecutively with the main body of the report. If an author has a strong reason for numbering these sections separately, this should be discussed in advance with an appropriate AFR/ARTS staff person (for FARA, with the PDS).
- Section 4.3.2/Titles of Sections/Body of the Report, should be modified in the following ways:
 - First-level headings (chapter titles) should be indicated with an Arabic numeral, noticeably larger type than body text, upper & lower case, bold, no italics or underlining.
 - Second-level headings (A subheads) should be all caps, bold, no italics or underlining.
 - Third-level headings (B subheads) should be upper and lower case, bold, no italics or underlining.
 - All subheads should be flush left, with no additional indentation for second- and third-level subheads.
 - Artificial page breaks should be used in two circumstances: (1) to enable chapter headings to begin at the top of a page, and (2) to prevent other subheads from appearing at the base of a page with fewer than two lines of following text.
- Contrary to section 4.3.3/Titles of Sections/Appendixes, appendix headings should be handled identically with chapter headings (see above).
- As noted in section 4.5/Listings, short items of 10 lines or fewer should be typed in block form. Contrary to 4.5, however, they should be preceded by bullets (•) or numbers, not by em-

dashes (—, --). In general, bullets should be used rather than numbers, unless the number of items itself is significant.

Grammar and Style

- 8) Chapter 5 of the CDIE style guide should be followed for matters concerning punctuation, abbreviations, capitalization, jargon and word usage, etc. However, the following exceptions to CDIE style should be observed:
 - Contrary to section 5.1.1/Punctuation/Abbreviations ..., the appropriate acronym for the U.S. Agency for International Development is "USAID." Headquarters in Washington, D.C., is abbreviated "USAID/W." Missions are abbreviated, for example, "USAID/Ghana."
 - Contrary to section 5.1.6/Italics (Underlining), italics (not underlines) should be used for titles of books and journals, unfamiliar foreign words, and words that require special emphasis. The use of bold type to give emphasis should be avoided, with the exception that bolding is appropriate for highlighting specific recommendations (including in the executive summary).

Desktop Typesetting / Design

- 9) The final layout, format, and placement and quality of graphics of any AFR/ARTS publication are subject to approval by the AFR/ARTS Director, the appropriate Division Chief, or his/her designee prior to publication.

The following two guidelines are specific to ARTS/FARA, not to EA or HHR:

- 10) The ARTS/FARA PDS is responsible for performing or overseeing the desktop publishing (DTP) of publications produced in house by ARTS/FARA for distribution outside AFR/ARTS. Because the use of DTP software allows for a visually appealing presentation, it can be tempting to use DTP for all documents. This can result in time lost as it becomes necessary to reformat information with each revision while documents remain in draft form. This time-consuming process can cause delays in the production of other ARTS/FARA publications that have been approved in final form. For this reason, the PDS should not be asked to convert in-house publications from word-processing formats (e.g., WordPerfect) to layouts using DTP software (e.g., PageMaker)

until they are in final form and ready for editing and publication. The PDS is contractually limited to work related to ARTS/FARA publications.

- 11) For any ARTS/FARA publication produced in house, the PDS is responsible for securing the printing and binding of publications upon approval of the Chief of ARTS/FARA or his/her designee. The quantity of documents ordered will vary depending upon the anticipated scale for document distribution as determined by the Chief of ARTS/FARA or his/her designee.

Publications Distribution / Dissemination

- 12) AFR/ARTS publications are assigned to serial numbers: an "ARTS Technical Paper Series" number and a CDIE document number. The ARTS number is assigned by Charlotte Davis within AFR/ARTS. The CDIE number is assigned by the Center's Document Acquisitions department. Within ARTS/FARA, the PDS is responsible for securing these numbers; within EA and HHR, a report's project manager has that responsibility.
- 13) All bulk distribution of ARTS publications done in house is to be coordinated either by the appropriate

project manager (or, as an alternative within ARTS/FARA, by the PDS in consultation with the project manager). If an ARTS collaborator is also responsible for distributing copies of a publication, the ARTS project manager serves as the primary contact with the collaborator, but, with ARTS/FARA publications, the PDS should be informed about all such distribution plans.

- 14) The appropriate ARTS Division (or, for ARTS/FARA, Analytical Unit) should formulate a customized distribution list for each publication that it sponsors. This process should be conducted with the knowledge of the Chief of each Division or his/her designee. Acceptance of the list by the Division Chief—and any other requisite internal approvals—should be obtained prior to the Unit's presentation of the list to the person responsible for processing the actual distribution of the publication—the project officer or, for ARTS/FARA, the PDS. (Note: The approval of a distribution list by a Division Chief or his/her designee does not necessarily imply the approval of that list for any other publication. Periodic review of these lists by the Division Chief or his/her designee is suggested to ensure its continued relevance.)

For further information about editing and preparing AFR/ARTS publications, contact the following person in the appropriate AFR/ARTS division:

Economic Analysis:	Craig Noren AFR/ARTS/EA	phone: 202-647-8811 fax: 202-647-2993
Food, Agri., and Resources Anal.:	Bradley Rymph, Publications/ Dissemination Specialist AFR/ARTS/ <u>FARA</u> .	phone: 703-235-5276 fax: 703-235-5454
Health and Human Resources:	Mary Harvey AFR/ARTS/ <u>HHR</u>	phone: 202-647-8533 fax: 202-647-2993
Mailing address:	U.S. Agency for International Development AFR/ARTS/_____, Room 2744 NS Washington, DC 20523-0089	

Project Impact Evaluation Reports

Program Evaluation Reports

Program Evaluation Discussion Papers

*Program Design and Evaluation
Methodology Reports*

Special Studies

Development Experience Abstracts

Occasional Papers

Working Papers

PUBLICATIONS STYLE GUIDE

PN ABD 392

**Center for Development Information and Evaluation
Bureau for Program and Policy Coordination
Agency for International Development**

January 1988

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PREFACE

This style guide was prepared by Meta de Coquereaumont of Professional Management Associates for the Center for Development Information and Evaluation (CDIE) of the Agency for International Development. It is based primarily on the U.S. Government Printing Office Style Manual, with some additions and modifications. This guide is intended for the use of those preparing reports for any of CDIE's evaluation report series, and its guidelines should be followed by authors, editors, word processing operators, and proofreaders.

1 INTRODUCTION

1.1 Background

The Agency for International Development (A.I.D.) began its evaluation report publication series in 1979 to support the dissemination of information concerning its experience in development. Under the direction of the Center for Development Information and Evaluation (CDIE), A.I.D. conducts project impact and program and policy evaluation studies that review A.I.D.'s experience in priority areas of activity.

The studies evaluate a project or set of related projects in a sector, focusing on program issues and their implications for planning and design. The goal of the evaluation program is to inform A.I.D.'s policymaking process and to improve project and evaluation.

The evaluation studies of studies comparability

cumulative findings of use to A.I.D. and the larger development community. The reports represent an effort by A.I.D. to obtain information on intended and unintended impacts of a program or project. Through examinations of A.I.D. and other donor and recipient country experience and the preparation of special syntheses, CDIE provides a better understanding of the characteristics of development programs and lessons of what works and does not work in various settings.

This style guide has been prepared to establish a basic level of consistency in style and format among all the evaluation reports published by CDIE. This level of consistency among reports is especially important as a consequence of A.I.D.'s determination that the findings of its evaluation work be made widely available.

ARTS/FARA adaptation:

Disregard all of chapter 1.

The prospective audience for these reports includes officials in host countries receiving U.S. support, other international and bilateral donors and private groups engaged in development work, as well as A.I.D. staff members and their counterparts in the field. These reports should strive to the fullest extent possible to adhere to production standards that reflect the high quality of the analysis presented in the reports.

1.2 Types of Evaluation Reports

CDIE is responsible for the publication of several types of evaluation reports. Among CDIE's major report series are the following:

1. Project Impact Evaluation Reports are based on project fieldwork performed by a multidisciplinary team of staff and uninformed and untrained and unfunded project staff. They are of primary interest to project staff.
2. Program Evaluation Reports provide information on evaluations of entire programs. They synthesize the findings of several project-level impact evaluations for a sector or a topic, or present the conclusions of A.I.D. workshops on topical or sectoral issues. They include specific statements on "lessons learned."
3. Program Evaluation Discussion Papers provide background information on topics of priority interest to A.I.D. They often are prepared prior to fieldwork in an "impact evaluation" area to provide a critical examination of assumptions and practices in a specific sector.

Introduction

4. Program Design and Evaluation Methodology Reports provide guidance on evaluation and data collection and analysis methods for project and program design.
5. Special Studies provide evaluative or other evidence that contributes to A.I.D.'s knowledge of special projects or programs.
6. Development Experience Abstracts are four-page abstracts of CDIE evaluation reports intended to provide rapidly for A.I.D. summaries of development components to read only the summaries of which may use them to determine whether they would benefit from reading the original report.
7. Occasional Papers provide information on current topics of interest primarily for A.I.D. internal use.
8. Working Papers are reports produced by CDIE or contractors that have not been published or widely disseminated. They frequently review A.I.D. experience on cross-

cutting issues of concern, such as project implementation problems or the effectiveness of particular institutions or technologies.

In general, these report series, with the exception of the four-page Development Experience Abstracts, follow the same format and contain the major sections that are described in this style guide. Although any one report may not contain all the sections discussed in Section 3, Report Organization, it should contain most of them. The

are to be prescribed. report series samples in

ARTS/FARA adaptation:

Disregard all of chapter 1.

APPENDIX EXHIBIT 1) IN COVER STOCK AND color and design elements.

1.3 Confidentiality

Reports must protect the informants and respondents interviewed during the evaluation. Although public officials may be quoted as appropriate, the report should contain no information through which other respondents could be identified.

2. REPORT PREPARATION

The responsibility for preparing the reports rests with the evaluation team, or with the author in the case of single-author reports. The team leader or the author is responsible for preparing the final manuscript. Publication of each report will be handled by CDIE once it has received the final manuscript from the team leader or author.

The final manuscript should reflect all comments previously solicited and accepted by the author or the team concerning substance, clarity, and structure of presentation, as well as comments and requirements from the Administrator. Authors should follow this style guide when preparing the manuscript to avoid the need for time-consuming revisions later.

The final manuscript evaluation report summary and a foreword (see Section 3 of major section), and any relevant appendices or bibliography.

After the first complete draft of the manuscript is input to the word processing system, and occasionally at an earlier stage, CDIE will assign an editor to review the draft (see Section 2.2).

2.1 Authors' Responsibilities

Although CDIE will provide for editorial review of all reports prior to publication, certain aspects of the editorial review process remain the responsibility of the authors. These include resolving any factual or logical inconsistencies and ensuring the accuracy of quotations and citations, statistical data, and the spelling of proper names.

2.2 Editorial Review

An editor will review all reports and examine them for a consistent level of analysis, including adherence to basic analytical and reporting requirements and clear derivation of findings from the data; avoidance of unfounded or sweeping generalizations; logical flow in presentation; and the highlighting of major issues, analysis, and findings.

The editorial review will also ensure the internal consistency of the report; the correctness of grammar, word usage, punctuation, and spelling; conformance of the final report with this style guide and the Government Printing Office Style Manual; adherence to basic principles of organization, including logical headings that are hierarchically structured and follow avoidance of

ARTS/FARA adaptation:

Disregard introduction to chapter 2 and sections 2.1, 2.2, and 2.3.

for omission of the table of contents between the tables and titles and

report section headings; and completeness of references.

Any logical or factual inconsistencies or any other problems with accuracy or completeness will be brought to the author's attention for final resolution.

2.3 Report Production

2.3.1 Preparation Cycles

After submission to CDIE, a report should have a maximum of three draft cycles before printing: (1) initial input in double-space format of the submitted manuscript draft; (2) a revision stage, when all major additions or changes are made to the draft and then submitted for word processing input in final, single-space format; and (3) a final

Report Preparation

minor revision stage for correcting any remaining inconsistencies of usage or spelling errors and for preparation of camera-ready copy.

Every effort should be made to avoid major draft revisions after the second review stage so that production expense can be kept to a minimum. It is wasteful of scarce A.I.D. resources to make major alterations, including large additions to or deletions from the text, during the third revision cycle. When revisions are made at this stage, additional time is required to reformat the text (for example, to move tables or change footnote placement). Because a great deal of time and attention are given to formatting text pages during the second revision stage, making major changes during the third stage means, in effect, that the initial effort was wasted.

2.3.2 Manuscript Proofreading

ARTS/FARA adaptation:

Disregard section 2.3.

The first draft of a report should follow the guidelines established in this style guide. This will reduce the time required to prepare the manuscript for input to the word processing system. Although an editor will review the manuscript to ensure adherence to these guidelines, less time will be required for this task if the guidelines are followed during initial preparation of the manuscript. Except when very extensive revisions are anticipated (and perhaps, in that case, you should ask yourself why such major revisions are anticipated and whether the changes could be made before word processing input), time is allotted during the first cycle for both careful editing and thorough proofreading of the report.

CDIE will provide for the editing and proofreading of the document; the authors are asked to provide some patience. Extra time spent at this

stage of production should decrease the time required at later stages. The editorial review will not only ensure adherence to style guidelines but will also note any problems with the report's logic and structure and the consistency of its findings. Careful proofreading is also important at this stage. If proofreading is delayed until the second or third cycle, the original manuscript is often no longer available, and the accuracy of figures, names, references, and so on cannot be verified.

2.3.3 Production Time

The first stage of production should take about 3 to 4 weeks (for a document of approximately 75 to 100, single-space pages). It includes editing (see Section 2.2), word processing input, proofreading, making corrections.

the pink could take about 2 to 3 weeks, depending on the extent of the revisions. During this stage, the document is formatted in its final, single-space form; pages are checked carefully for filled right margins (words are hyphenated to avoid distracting gaps in the margin); correct placement of tables (as soon after their in-text reference as possible), footnotes, and headings; and removal of widows and orphans (single lines of text at the top or bottom of a page). Revisions and new input are proofread and corrected.

The third stage of production should take about 1 week to 10 days if no extensive revisions have been made in the draft. Any final formatting changes are made, and the entire document is proofread again to ensure that there are no typographical errors or internal inconsistencies of usage that

~~might have slipped through the first two reviews.~~

2.4 Composition

Much has been written about the subtleties of logical, precise, and effective writing. The guidelines presented here raise only a few of these points, but careful attention to these principles can improve the quality and precision of one's writing.

Effective writing is not an innate ability for most people. It is an arduous task requiring diligence and forethought. If written information is to be clearly communicated, the essential task is not so much "having it all in your head or in your notes" as "getting it down on paper" in a way that is as intelligible to the reader as it is to the writer.

2.4.1 Organization

Report as a Whole. Think about how you want to present your material and what its main thrust will be. Time spent in organizing thoughts is never wasted; the result is a well-conceived, well-ordered presentation. An unorganized paper reflects badly on the writer and the material, if it is able to reflect anything at all.

Use the table of contents as a check on the organization of your report. Do similar heading levels contain information at a parallel level of organization? (Are headings phrased in parallel grammatical form?)

Are themes/arguments for the findings fully developed and logically structured and connected? Remember that most readers are not as familiar with the subject as you are; do not assume that they will be able to intuit missing or implied information or connections.

Watch out for unintentionally elliptical arguments and for conclusions that leap over intermediate supporting arguments without detailing them.

Describe at the beginning of the report what the project/program was trying to achieve and anything else about the project that is important for understanding the findings. Explain clearly what aspects of the project/program are being evaluated.

Evaluation reports, unlike novels, should not start in media res. Some reports discuss the issues to be evaluated and move on to the findings without adequately describing the project/program. The reader then has to piece together bits of information about the project that are presented throughout the report before being able to understand the arguments and findings. Thus, readers may have no context for understanding the issues until they are well into the report; many readers may not be willing at that point to start over again in order to capture ideas that were not clearly understood on first reading.

Try to arrange appendixes in a logical order, either by following the organization of the main report or by selecting some other method of organization. (Don't simply arrange them in the order in which they were completed.) Examine each appendix carefully for relevance, and discard any appendixes or sections of an appendix that simply repeat information covered elsewhere without adding any new insights.

Sections and Paragraphs. Clarity of organization requires more than simply giving a section a heading and then putting all information relating to that topic in that section. The progression of an argument should be clearly presented, with appropriate transitions between ideas (i.e., between paragraphs or subsections).

Composition

"As a general rule, begin each paragraph either with a sentence that suggests the topic or with a sentence that helps the transition" (Strunk and White, The Elements of Style, 1979, p. 16). The need to provide a clear transition between ideas is often overlooked. A paragraph's relation to what precedes it and its function in the section as a whole may need to be expressed explicitly.

Do not ramble. Express one idea completely before moving to the next. In general, each paragraph should contain a thorough discussion of a topic or a particular facet of a topic. The paragraphs should move logically from one to another, especially when the ideas expressed are closely related. The reader should be able to sense the progression of a rational thought process from one point to the next.

Each paragraph should have a clear structure. Length is not a sufficient determinant of the need to start a new paragraph (although a very long paragraph may indicate that too many ideas are being expressed in that paragraph).

The three basic forms of paragraph structure are as follows:

- *Single theme*--each sentence has the same subject but each sentence provides additional information on that subject
- *Linear development*--new information provided in one sentence becomes the subject of the next sentence
- *Branch pattern*--the topic sentence is followed by examples supporting the topic idea

2.4.2 Tone of the Report and Point of View

Assess carefully your approach to your audience. For example, extreme informality or a too colloquial approach to your topic would not be appropriate in an evaluation report. Although a paper can benefit greatly by incorporating some elements of a personalized style, remember that A.I.D. publications will be read by a wide audience concerned with development issues and that you may need to temper your style accordingly. However, an extremely conventional, impersonal, or leaden style is tedious to read and can limit the impact of the paper by discouraging readers who tire of the style before they reach the meaning that lies behind it.

Be attentive also to the need to avoid unintentional value judgments; strive for an objective and unbiased presentation of your topic.

Avoid humor in formal writing because it is impossible to gauge how people will react. Also avoid jargon, but don't confuse jargon with technical expressions that are essential to precise communication of meaning. Remember that a publication may be referred to for years to come, long past the currency of a word or phrase in vogue when it was issued.

In general, use the active voice, which is stronger and more direct than passive constructions:

Lack of funds constrained the extent to which the strategy could be implemented. (weak passive construction)

Lack of funds prevented full implementation of the strategy. (better)

The quality of your writing represents the quality of your work. No matter how significant the conclusions of a paper might be, if the paper cannot be understood or the arguments followed, it is as if the conclusions had never been reached and the work had never been done.

2.4.3 Practices That Impede Comprehension

Fat. Many writers unintentionally weigh down their sentences with superfluous words or weak constructions that slow comprehension.

Avoid superfluous nouns:

the field of economics ("economics" is sufficient)

the level of wages rose (wages rose)

the volume of demand fell (demand fell)

Avoid weak or superfluous verbs and the use of nouns when a verb would be stronger or more direct:

performed a study of the effects (studied the effects)

provide a summary of (summarize)

make a decision about (decide)

Avoid wordy phrasing:

the facts that are contained in (the facts in)

the project that was located at that site (the project at that site)

the fact that the project continued was (that the project continued was)

a number of reports (several, many, some, or nine reports)

Avoid unnecessary "it" and "there" constructions:

It was the Minister of Agriculture who decided (The Minister of Agriculture decided)

There are some projects that will (Some projects will)

Frustrated Expectations. Do not frustrate the reader's expectations. Don't use the other hand without the first hand. When confronted with "on the other hand," a reader looks for "on the one hand." Needless confusion arises when the reader can't find the first hand. "Hands" (one or the other) are not usually necessary in any case. Try to substitute "but," "however," or "conversely."

Do not say, "The following seven factors" and then list six or eight.

Gender Bias. The slight awkwardness attendant on using the "his or her" construction is preferable to slighting many of your readers. The need for a his-or-her construction can often be avoided by recasting nouns in the plural or by recasting the sentence:

If a writer wants to know whether a reader would have trouble understanding the report, he might talk to him and ask him to point out any difficulties. (This sentence also has problems with unclear pronoun reference.)

A writer who wants to know whether readers are having trouble understanding the report might talk to some of them and ask them to point out any difficulties.

Composition

Clarity of Modification. Watch for unclear referents for "this," "these," "that," "which," and "who." If there is any potential for confusion, repeat the noun rather than use the pronoun. In some cases the confusion simply delays comprehension; in others, it makes comprehension impossible.

Do not use a pronoun before the noun to which it refers:

Given its short time frame, the project had to emphasize immediate outputs.

A.I.D.-Specific Terms. Briefly define terms that are used with an A.I.D.-

specific meaning, such as Project Paper, logical framework, and project inputs, outputs, goal, and objectives.

2.5 Other Style Guides

CDIE has tried to keep this style guide useful, minimal, and straightforward. In general, these guidelines reflect the standards outlined in the U.S. Government Printing Office Style Manual. For additional information on style, particularly on handling references, see The Chicago Manual of Style (University of Chicago Press, 1982, 13th ed.).

3. REPORT ORGANIZATION

All evaluation reports should follow the same basic format and stylistic conventions and contain the same basic parts in the same order. The resultant consistency among and within reports will not only prevent any irrelevant distractions to the reader arising from inexplicable variations in format or style, but will also enable a reader to find and analyze relevant parts of a report with greater ease.

Reports, including all appendixes, should be limited to 100 pages or fewer of single-space text. All reports should contain most of the following features and in the following order.

3.1 Cover

CDIE will use a typeface which is the same as that used in the report (i.e., the typeface).

The first line of the cover designation (i.e., Section 1.2) and the CDIE-assigned report number. The next section of the cover contains the report title. A flattened projection of the eastern and western hemispheres occupies the center of the cover. The date (month and year), the identification of A.I.D. as the sponsor and publisher of the report, and the publication identification number are at the bottom of the page, each on separate lines. Each of these sections is separated from the others by a continuous rule.

See Appendix Exhibit 1 for sample cover pages for each of the major types of reports produced by CDIE.

The following statement, centered and boxed on the inside of the front cover, should be included to inform the reader

ARTS/FARA adaptation:

**Disregard all of chapter 3—
See “Preparing ARTS/FARA
Publications: Basic Editorial
Guidelines” for help on report
organization.**

that a list of evaluation reports is available from CDIE:

This report and others in the evaluation publication series of the Center for Development Information and Evaluation (CDIE) may be ordered from

*A.I.D. Document and Information
Handling Facility
7222 47th Street, Suite 100
Chevy Chase, MD 20815
U.S.A.
(telephone: (301) 951-9647)*

A list of all CDIE evaluation publications is available from

*PPC/CDIE
Room 105 SA-18*

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cover.

3.2 Front Matter

3.2.1 Title Page

The title page should contain the report title (underscored), publication series type and number, authors and their affiliation and area of expertise, A.I.D.'s identification as sponsoring agency, date of publication, and A.I.D.'s official disclaimer concerning responsibility for the views contained in the report. If the title takes up more than one line, use 1 1/2-line spacing (for the title only). See Appendix Exhibit 2 for a sample title page.

Report Organization

3.2.2 Contents

The table of contents includes sections to the third level of headings only.

See Appendix Exhibit 3 for a sample contents page that shows the proper formatting for the table of contents.

3.2.3 Foreword

All Project Impact Evaluation Reports should contain the sample foreword provided in Appendix Exhibit 4, revised as appropriate to the report. A foreword is optional for other types of reports.

If a foreword is planned, keep in mind that a foreword is an introduction written by someone other than the author. The introduction should be written by the author. The introduction should be written by the author.

3.2.4 Acknowledgments

Inclusion of acknowledgments is discretionary. Acknowledgments are included to acknowledge assistance received in performing the evaluation or preparing the report. If the acknowledgments are very short, they may be included at the end of the preface.

3.2.5 Preface

Any introductory or incidental notes by the authors should be included in the preface. Material essential to an understanding of the text or a discussion of methodology should not be placed in the preface.

3.2.6 Summary

Authors should provide a two- to five-page summary of salient features of the

report. Because the summary may also be circulated separately, the information in it should be self-contained and should focus on major findings and lessons.

It should contain a short paragraph on why the report was done and a concise description of the contents of the report—the issues addressed, major findings, and conclusions. The emphasis should be on lessons learned as well as on conclusions and recommendations.

3.2.7 Project Data Sheet

See Appendix Exhibit 5 for the standard information to be included on the project data sheet for Project Impact

ARTS/FARA adaptation:

**Disregard all of chapter 3—
See “Preparing ARTS/FARA
Publications: Basic Editorial
Guidelines” for help on report
organization.**

Include a glossary of acronyms, or technical terms specific meaningful to some range rates for country under

discussion (e.g., PI = \$0.70) should be included, if relevant.

See Appendix Exhibit 6 for a sample glossary.

3.2.9 Map

Project Impact Evaluation Reports should include a map of the country in which the project is located. The map should be of the entire country, not only of the section of the country in which the project is located. Maps should be secured from the Department of State through CDIE.

3.3 Body of the Report

For Project Impact Evaluation Reports, the body of the report should be limited to 15 single-space pages, using Courier (Titan) 10 typeface. (See Section 4.1 for complete word processing guidelines.)

Authors of other CDIE report series publications should limit their length for keeping in mind a recommendation of 15 pages.

ARTS/FARA adaptation:

**Disregard all of chapter 3—
See “Preparing ARTS/FARA
Publications: Basic Editorial
Guidelines” for help on report
organization.**

3.4 Appendixes

Appendixes may include discussions of the report, field notes, copies of questionnaires used to gather data, tables, graphs, detailed maps, and photographs. Mission comments, when available for Project Impact Evaluation Reports, should be included as an appendix. If a discussion of the methodology applied in the evaluation is included, it should be designated Appendix A. Each appendix should be referenced at an appropriate point in the main body of the text.

3.5 Footnotes

Any explanatory notes or clarifying details helpful to an understanding of the text but nonetheless digressive in nature should be placed in a footnote at the bottom of the page that contains the text to which it refers. Explanatory notes should be numbered consecutively throughout each major part of the main body.

Bibliography

all citations supplementary to the text should be provided.

If a bibliography contains many entries, not all of which are cited in the text, a separate reference section should be created that includes only cited works. If most of the entries in the bibliography are cited in the text, or if the bibliography is short, a separate reference section is not required. The reference section follows the last appendix, followed by the bibliography.

4. FORMAT

4.1 Word Processing Formats

Follow the formats listed below when typing the final report:

ARTS/FARA adaptation:

**Disregard section 4.1—
See “Preparing ARTS/FARA
Publications: Basic Editorial
Guidelines” for help on
word-processing formats.**

graphs (double space the first two draft versions).

4. Center page numbers at the top of the page, on line 6; begin text on line 8 and end it on line 59 (52 lines of text per page), including any footnotes.
5. Indent paragraphs 5 spaces, beginning text on space 6.
6. Use a 66-character line (start on character space 11).
7. Separate footnotes from the text by one empty line and a 20-character rule. Leave one empty line between footnotes. Footnote numbers should be superscripted. Do not indent runover footnote lines, but bring them back to the left margin (except in tables; see subsection 4.4.2).

4.2 Pagination

The front matter is paginated using lowercase Roman numerals. The title page (and its blank reverse side) and contents page are assigned numbers, but the numbers are not typed on these pages. Thus, the visible numbering usually begins with the foreword, which is generally page “-v-” (the first page

of text following the table of contents must begin with an odd page number).

The body of the report is paginated using Arabic numerals centered at the top of each page, the number preceded and followed by a hyphen (-2-). The first page is assigned a number, but it does not appear on the page; therefore, “-2-” is the first typed number.

~~Appendixes are paginated “A-2,” “B-2,” “C-2,” and top of the page does not ARTS/FARA adaptation: Contrary to section 4.2, appendixes and the references/bibliography should be numbered consecutively with the main body. Ref-3,” and is paginated “Bib-2,” “Bib-3” so on.~~

4.3 Titles of Sections, Subsections, and Appendixes

4.3.1 Front Matter

The identifying titles of front matter sections (contents, foreword, and so on) should be in capital letters, centered, and underlined, with two empty lines between the title and the text:

FOREWORD

4.3.2 Body of the Report

The system for identifying and ranking levels of headings is numerically based (“legal style”) and follows the numbering system used in this style guide. Try to limit section heads to three organizational levels. Anything more detailed looks pretentious and cluttered in a short report.

Never use only a single subsection heading at any given level, such as 1.1 without 1.2.

~~Section headings are placed at their natural occurrence in text; no artificial page breaks are created for new sections. Note that section headings (e.g., 1., 2., 3.) are centered and subsection headings (e.g., 1.1, 1.2.1) are flush with the left margin.~~

~~Major sections (first-level headings) should be identified by Arabic numerals, followed by a period and two spaces, then the section title in capital letters, underlined, and centered. Two empty lines should precede and follow each new heading. For example:~~

~~1. INTRODUCTION~~

Second-level subsection headings within each section indicate their ranking by the sequential addition of numerals after the number (and the period) of the section's main heading. For example, subsections within Section 1 would be as follows: 1.1, 1.2, 1.3, and so on. ~~The number is typed flush left, followed by two spaces and then the subsection title in uppercase and lowercase letters and underlined. Two empty lines precede and follow each subtitle. (See Section 5.1.1, Abbreviations, Capitals, and Periods, for rules on capitalization in headings and titles.) Some examples:~~

~~1.1 Project Setting~~

~~1.2 Intended Beneficiaries~~

A final organizational section (third-level headings) is identified by the sequential addition of numerals after the second-level heading numbers. For example, third-level subsections within Subsection 1.2 would be as follows: 1.2.1, 1.2.2, 1.2.3, and so on. ~~The num-~~
ARTS/FARA adaptation:

- Contrary to section 4.3.2, headings should be treated as follows (all levels flush left):
- 1st-level (chapter head): noticeably larger type than body text, upper & lower case, bold, no italics or underlining.
 - 2nd-level (A subhead): all caps, bold, no italics or underlining.
 - 3rd-level (B subhead): upper & lower case, bold, no italics or underlining.

In addition, artificial page breaks should be used (1) to enable chapter headings to begin atop a page, and (2) to prevent other subheads from appearing at the base of a

~~spaces and then the heading in upper-case and lowercase letters and underlined. Two empty lines precede and follow each new heading. For example:~~

~~1.2.1 Benefits to Participating Farmers~~

If, after some effort is made to restructure the headings, a fourth level of headings is still necessary, use a run-in heading. This heading is indented as a paragraph, underscored, in uppercase and lowercase letters, and followed by a period, two spaces, and the first word of the text. No number precedes the heading; only one blank line separates the heading from the preceding paragraph. For example:

Farm Production. On average, individual farm production is higher

In rare cases, a fifth-level heading may be necessary. When a fifth-level heading is used, the fourth-level heading changes; it is flush left, underscored, in uppercase and lowercase letters, and preceded and followed by two blank lines. No number precedes the heading. The fifth-level heading then takes the format described above for fourth-level headings in a paper with only four levels of headings. (Fourth- and fifth-level headings are not included in the table of contents.) The following are examples of fourth- and fifth-level headings:

Farm Production

On average, individual farm production is higher (fourth-level heading when five levels are used)

Farm Production. On average, individual farm production is

Format: Tables and Figures

4.3.3 Appendixes

Appendixes are labeled alphabetically (Appendix A, Appendix B, and so on). Appendixes should not have separate cover pages. ~~The appendix designation (e.g., Appendix A) should be centered at the top of the first page of text, in capital letters, with no underline. The appendix title, in capital letters and underscored, should be centered underneath it, separated from it by one empty line and separated from the text by two empty lines.~~

~~— APPENDIX A —~~

~~METHODOLOGY~~

The appendix section headings should follow the same style as those in the body of the report (see Section 4.3.2). Each appendix should be referenced at least once in the main body of the report.

4.4 Tables and Figures

4.4.1 General Information

Tables contain information in columns and rows. Although most tables contain statistical data, tables may also contain phrases or short sentences (as, for example, in a table comparing characteristics for several projects). Figures are the graphic representation of data, such as graphs, pie charts, line drawings, or photographs.

Tables should be integral to the text and provide easy access to information that is not as readily grasped when treated in narrative form. Tables should not simply reiterate material that is fully covered in the text.

Each table should be developed as a discrete, self-contained entity that is fully comprehensible to the reader even

when examined out of the context of the report.

The table title should describe the table uniquely: it should clearly specify the topic, describe the table's contents including the time period covered, and relate the table to its context.

Every table column, including the stub (the first column), should have a heading. Some columns also require spanner heads, heads that span two or more subheads.

Each table should be referenced in the text, and a table should be placed within the text as soon after its callout as possible. Never place a table before its callout in the text. If a table does not fit on the same page as the callout, it should be placed at the top of the next page or immediately after the end of a paragraph that is continued on the next page. (Tables should always be placed at the end of a paragraph and never in the middle.) Full-page tables should be placed on the page following their callout.

Try to avoid creating tables that are so wide that they will not fit normally on a page but must be rotated to run the length rather than the width of the page ("broadside tables"). Broadside tables are more difficult to process and to read. If a broadside table must be used, it should be arranged on the page so that the top of the table runs along the left margin of the page in its vertical position.

4.4.2 Format

An example of basic table format is provided in Appendix Exhibit 7.

Tables and figures are numbered consecutively but independently of each other, using Arabic numbers. Thus, the first table in the main body of the re-

port would be Table 1. Appendix tables are numbered separately for each appendix, preceded by the appendix designation and a hyphen, for example, Table A-i, Table B-l.

The first letter of the word "table" or "figure" and the first letter of each major word in the table title are capitalized. (See Section 5.1.1, Abbreviations, Capitals, and Periods, for more detailed guidelines on capitalization within titles.)

Table titles are centered two empty lines above tables and figures. Titles should be repeated at the top of tables that are continued on a second or third page, followed by the abbreviation "cont." in parentheses: (cont.).

Information describing or qualifying the table as a whole, such as specification of the unit of presentation (e.g., "in U.S. dollars per metric ton") should be placed in a headnote in parentheses immediately below the table title, with no intervening blank line. Use lowercase letters for headnote information.

Table titles should never be footnoted. When explanatory material is too detailed for a headnote, it should be placed in a note at the bottom of the table, one empty line below the closing horizontal rule, preceded by the word "Note:" typed flush with the left margin. Runover lines are blocked (indented) under the first word following "Note." This general note precedes any footnotes to the table.

Each column head and stub entry should also be in uppercase and lowercase letters (that is, the first letter of each major word should be capitalized). Each line of a column head, including spanner heads, is centered over its column(s). Runover lines in stub entries are indented one space; subelements under stub entries are indented two spaces.

Horizontal rules are placed one empty line above and one empty line below the column heads. These rules should extend the entire width of the table. Another horizontal rule is placed at the end of the table, one empty line below the last row of figures. Note that this bottom rule marks the end of a table; a rule should not be placed at the bottom of a table that is continued on another page, but only at the end of the table.

Any spanner head is underscored with a line that extends the full width of the column heads to which the spanner head applies.

To avoid confusion with data in tables, table footnotes are indicated by superscript lowercase letters, not by numbers. Footnote sequencing in tables is from left to right across rows, not column by column.

Table footnotes are placed one empty line below the bottom rule of the table, or one empty line below the table note, if there is one. No blank lines should be placed between table footnotes (except to help fill a page when the table is a short, full-page table). Runover lines in footnotes are blocked under the first word of the footnote, not under the superscript footnote letter. Notes that refer to the table as a whole (rather than to a column head, stub entry, or cell entry) should be placed in a headnote or table note (see above).

The table source follows one empty line below the last table footnote, introduced by the word "Source:"; runover lines are blocked under the first word after the word "Source."

4.5 Listings

Short lists of items that require emphasis or ranking within a sentence may be preceded by numbers enclosed in parentheses. A numbered list within a

Format: Lists and References

sentence should follow the standard rules of punctuation and grammar—the same rules that would apply if the numbers were not used. For example:

The issues reviewed below are (1) the development of entrepreneurial talent, (2) the role of small-scale enterprises, and (3) the importance of market infrastructure.

Note that this list is not preceded by a colon unless the sentence structure itself requires it, as in this example:

The following issues are reviewed below: (1) the development of entrepreneurial talent, (2) the role of small-scale enterprises, and (3) the importance of market infrastructure.

Vertical lists of items removed from a sentence and placed on separate lines beneath it should be used sparingly and only for items that require the emphasis such isolation of each item provides (see also Section 5.1.4, Dashes).

~~Short items of 10 lines or fewer are typed in block form, preceded by numbers or em dashes (—), not by "bullets." In general, use em dashes rather than numbers to introduce items in a short list except when the number of items is itself significant. The number or em dash is indented five spaces (start on the sixth space) and followed by two empty spaces. Runover lines are blocked under the first letter of the first word. Subelements under these are preceded by em dashes, when numbers have been used in the initial list, or en dashes (–) when em dashes have been used.~~

Long items of more than 10 lines are treated as separate paragraphs. Use numbers rather than em dashes to introduce each item.

Some rules of punctuation and capitalization are suspended for vertical lists broken out of text on the theory that such lists are by their nature nonstandard formations. Short items require no terminal punctuation, but lists composed of complete sentences do take terminal periods. For visual consistency, all items in a list should have terminal periods if one or more of the items is a complete sentence. Internal punctuation for each item in a list is orthodox. The first word of each listed item should be capitalized.

4.6 References and Bibliography

Reports should follow the author-date system for citations. Citations are placed in text in parentheses following the passage to which they relate. The citation includes the author's last name and the date of publication of the work, with no intervening punctuation. If a page number is required (for a quotation), the page number follows the date, preceded by a comma only:

(Rostow 1983, 17)

If more than one work by the same author and published in the same year is cited, the works should be distinguished by a letter following the date:

(Rostow 1983a)

(Rostow 1983b)

The bibliography section (and the reference section, if one is included) should contain complete references for all works cited.

For a book, the following facts should be included in the following order:

*Name of author or authors, editors,
or "institutional author"
Date of publication
Title*

Contrary to section 4.5, listings typed in block form should be preceded by bullets or numbers, not by em-dashes. Bullets are preferable to numbers, unless the number of items itself is significant.

Title and number of series, if any
Edition, if not original
City and state or country of
publication
Publisher's name

For an article in a periodical, the following information is required in the following order:

Name of author or authors
Date
Title of article
Name of periodical
Volume number
Issue number (or month) if periodical is paginated by issue
Page numbers of the article

Items are arranged alphabetically by the author's last name. Because the author-date system of citation is used in text, the date of publication should follow the author's name for ease in locating the appropriate reference.

When more than one work by the same author(s) is cited, the items should be arranged chronologically (earliest work first). When multiple works by the same author(s) and published in the same year are cited, they should be listed in alphabetical order (by title), with the dates followed by letters, beginning with "a":

Bates, R. 1970a. Essays on the...

Bates, R. 1970b. Markets and States...

The bibliography and references sections use a hanging indent style, with the second and subsequent lines in each entry indented five spaces from the left margin.

Major elements within a reference are separated from each other by periods.

All authors should be listed for each publication in the bibliography and

reference sections ("et al.," which may be used for in-text citations of publications with more than three authors, should not be used in the bibliography).

Some sample bibliographic entries are provided below. For more detail, consult The Chicago Manual of Style (University of Chicago Press 1982, 13th ed.).

A book with a single author:

World Bank. 1984. Toward Sustained Development in Sub-Saharan Africa. Washington, D.C.: World Bank.

A book with two or more authors:

Johnston, Bruce, and Peter Kilby. 1975. Agricultural and Structural Transformation: Economic Strategies in Late-Developing Countries. New York: Oxford University Press.

Note that when authors are identified for government reports, the authors' names should be used and the government agency listed as publisher, not as author:

Love, Ray, Peter A. Theil, and Philip W. Ruppert. 1986. The Private Development Corporation of the Philippines. A.I.D. Evaluation Special Study No. 46. Washington, D.C.: Agency for International Development.

A chapter in a book compiled by an editor (inclusion of page numbers for the chapter is optional):

Bhagwati, J. 1970. "The Tying of Aid." In Foreign Aid, edited by J. Bhagwati and R.S. Eckhaus, 112-179. Baltimore: Penguin Books.

Format: References

A reference to a book compiled by an editor rather than to a chapter in the book:

Bhagwati, J., and R.S. Fickhaus, eds.
1970. Foreign Aid. Baltimore:
Penguin Books.

When no date of publication is available, "N.d." is used in place of a date:

Barak, Eli. N.d. "Report on Experiments Carried Out Under Irrigation in Winter 1983." Kasinthula, Malawi: Kasinthula Research Station.

For unpublished duplicated material:

Berg, Elliot, Walter Hecox, and Jim Mudge. 1985. "Evaluation of the A.I.D. 1983-1984 Structural Adjustment Program in Kenya." USAID/Kenya. Photocopy.

An article in a journal:

Landau, Martin. 1969. "Redundancy, Rationality, and the Problem of Duplication and Overlap." Public Administration Review 29:346-358.

References to journals that are paginated by issue rather than by volume must identify the issue by providing the issue number or the month(s):

*Public Administration Review 29
(no. 4):346-358.*

*Public Administration Review 29
(July-August):346-358.*

5. GRAMMAR AND STYLE

5.1 Punctuation

The following information covers only the most commonly encountered difficulties with punctuation. For more detail, refer to the U.S. Government Printing Office Style Manual.

Note that many issues of punctuation are discretionary, and the choice of which style to follow is often a matter of convention rather than correctness. The purpose of this style guide is to set up conventions so that idiosyncratic choices do not distract the reader from what is really significant: the analysis and findings presented in the paper.

5.1.1 Abbreviations, Capitals, and Periods

Abbreviations. Avoid the use of abbreviations in formal writing. Abbreviations should be used only when they aid the reader, not as a short-cut for the author. It is very frustrating and ultimately irritating to a reader to be confronted with a plethora of abbreviations on each page; few people are able to remember the meaning of an unfamiliar abbreviation for more than a few pages.

In general, use abbreviations for the names of agencies, organizations, and institutions (after defining the abbreviation on first use) when this is the common way of referring to the organization (e.g., ~~A.I.D.~~) or when the name is long and cumbersome and the organization is referred to frequently in the paper. When appropriate, or when the abbreviation is not one that is commonly used, use a shortened form of the name instead of an abbreviation (e.g., the Foundation, the Institute, the project).

Except in the case described in the preceding paragraph, do not create *ad hoc* abbreviations. Their use only confuses the reader and impedes comprehension. A string of abbreviations can also be unintentionally humorous. As a reader, which of the following sentences would you prefer to read?

The MOA's AD Program included both MADs and FADs at all levels of the extension system.

or

The agricultural demonstrator program of the Ministry of Agriculture included both male and female agricultural demonstrators at all levels of the extension system.

Avoid most Latin abbreviations, especially "i.e.," "e.g.," and "etc." In most kinds of writing, the English equivalent is now preferred to the Latin abbreviation: "that is" for "i.e." (note that "i.e." does not mean "for example"), "for example" for "e.g.," and "and so on" for "etc." These abbreviations are acceptable, however, within parentheses.

"Etc." is frequently abused. Do not use it simply to avoid completing a series; its use, and that of its English equivalent, should be limited to lists whose logical extension is obvious or to end a series that repeats only part of a list already quoted in its entirety.

Never use "for example," "such as," or "e.g." with "etc." or "and so on." Such usage is redundant because these terms already imply an incomplete list. For example:

Several crops, such as beans, corn, wheat, and so on, had been grown in the area for many years. (incorrect)

Abbreviations and Capitalization

Several crops, such as beans, corn, and wheat, had been grown in the area for many years.
(correct)

Do not use abbreviations in a heading or in a table title.

Keeping these principles in mind, use the following guidelines when you have determined that use of an abbreviation is warranted.

In general, when abbreviating a word or words, capitalize as in the original word. Periods are usually omitted in abbreviations except for abbreviations of states, months, proper names, Latin terms, university degrees, and in cases in which abbreviations might be confused with other words ("a.m." and "am," "no." and "no"). Some examples:

NE ft lb kg ha PL 480
A.I.D. B.A. a.m. et al.

Omit periods and spaces after initials used as shortened names of government agencies (~~except A.I.D.~~) and other organized bodies; before using the abbreviation, however, use the complete name in the first reference and give the shortened form in parentheses:

U.S.
Agency for International Development (A.I.D.) (USAID)

U.S. Department of Agriculture (USDA)

Although the general rule is to write out the full name once, followed by the shortened form in parentheses, and thereafter to use the shortened form, common sense and readability should temper this practice. Abbreviations should be defined anew in each major section of the report (front matter, main body, and each appendix) or if a subsequent reference appears some distance from the original reference. The shortened form should only be

repeated if it will be used again soon after this reference. Unless the name is repeated frequently and considerable space is conserved or monotony is avoided by using the abbreviation, it is better to use the full name (or a shortened form of the name) of an organization rather than risk confusion.

In general, use English translations of names of foreign agencies or government bodies, even when the abbreviation is based on the foreign name:

Brazilian Institute of Geography and Statistics (IBGE)

Use fiscal year 1980 or FY 1980 but not FY80 or FY '80.

Spell out the term "United States" when using it as a noun; abbreviate it when using it as an adjective:

foreign policy of the United States

U.S. foreign policy

Capitalization. Capitalize the words "government" and "federal" when referring to the U.S. Government or specifically to another central government. Also capitalize the word "state" when the reference is to one or more of the 50 states in the United States. For example:

Federal Government
the Government (a specific central government)
Government-owned land
Maryland State government

but

federal form of government
statehood

The words "national" and "federally" are not capitalized even when the reference is to a specific central government, and "state" is not capitalized in closed com-

ARTS/FARA adaptation:
Contrary to section 5.1.1, the appropriate acronym for the Agency is USAID.

pound words, even when the reference is to a particular state:

national customs
federally funded
statewide policy

Capitalize the word "Mission" when referring to a USAID country field Mission.

Capitalize references to A.I.D. project-related documents, such as Project Papers and Project Identification Documents, and to A.I.D. Policy Papers.

Capitalize all words in subsection headings and titles of publications except prepositions and conjunctions of three letters or fewer and articles. Capitalize the word "to" when part of an infinitive.

Capitalize personal titles and position titles when they precede a proper name:

President Archibald McLean
Mission Director Jenkins

but do not capitalize position titles used alone or titles following names unless they indicate high distinction:

George Washington, President of
the United States
Archibald McLean, president of
Omni, Inc.
the Mission director

Capitalize the words "table," "figure," or "appendix" only when referring to a specific table, figure, or appendix:

the third column in Table 3
Appendix C contains detailed
information.

Note that although an abbreviation formed from the first letter of each word in a term uses all capital letters,

the first letter of each word in the term itself is not necessarily capitalized. For example:

GNP but *gross national product*,
not *Gross National Product*

5.1.2 Colons and Semicolons

Colon. Use the colon to introduce explanatory or summarizing material:

The report has three parts:
project goals, project impacts,
and conclusions and recommen-
dations.

Note that items in a series following a colon are not automatically separated by semicolons. Commas are used unless one or more of the items (except the last) contain internal punctuation.

Do not use a colon to introduce a list that is a complement or object of an element in the introductory statement:

The three countries examined
were: Egypt, Peru, and Jamaica.
(incorrect)

The three countries examined
were Egypt, Peru, and Jamaica.
(correct)

This rule also applies to the use of colons before lists that are broken out of text and placed on separate lines (see also Section 4.5). Use a colon after the introductory statement only when it contains the words "as follows," "the following," or "for example"; when the introductory statement is grammatically complete without the list that follows; or when the statement is followed by an illustrative example.

Semicolon. Use the semicolon to separate main clauses not joined by a coordinating conjunction but too related in meaning to form separate sentences:

Commas

The first agricultural center building was completed; construction on the second had not yet begun.

Separate by a semicolon main clauses joined by conjunctive adverbs such as "however," "consequently," "indeed," "therefore," or "thus":

The team would have liked to visit each of the new schools; however, there was time to visit only a few schools in each area.

If any element of a series other than the last item contains internal punctuation, use semicolons to separate the main elements, as shown in the following example:

Members of the team will read, write, and speak perfect English; will prepare correctly formatted reports with no ambiguities or contradictions; and will cite completely all references, tables, and figures.

5.1.3 Commas

Commas are required in specific, fixed situations and in discretionary usage when their absence might cause confusion. An example of the latter:

Out of 20, 10 were rejected.

Separate each member of a series by a comma, including the one preceding the conjunction, to avoid ambiguity:

Labor surpluses, shortages of machine parts, and land-holding patterns inhibited mechanization.

Use a comma to separate a series of modifiers of equal rank:

Credit is now allocated to small, rural, off-farm industries.

but do not use a comma when the final modifier forms a unit with the noun modified:

The project tried to improve the distribution of small-scale farm machinery.

Use a comma to divide two clauses with separate subjects and predicates joined by a conjunction:

By 1981, 46 percent of farmers were full or partial tenants, and 22 percent of the land area was farmed by tenants.

but do not use a comma to separate two clauses that share a subject:

Mechanization plays an increasingly important role in rural strategy and is likely to continue to do so.

Use a comma to separate an introductory word, phrase, or clause from the rest of the sentence:

In all cases, growth in agricultural production declined in the 1970s relative to the 1960s.

Nonrestrictive phrases and clauses are those that add to the meaning of a sentence but are not essential to its meaning. They are often introduced by the relative pronoun "which." Enclose nonrestrictive phrases and clauses with commas. For example:

The program was part of a coordinated donor effort, which included the International Monetary Fund, to promote structural adjustment.

Restrictive phrases and clauses are those that are essential to the meaning of a sentence. They are often introduced by the relative pronoun "that." Do not enclose restrictive phrases or

clauses with commas, and do not introduce them with the relative pronoun "which." For example:

The program became part of a coordinated donor effort that promoted structural adjustment of the economy.

Use commas in numbers of four or more digits to facilitate quick comprehension of the magnitude involved:

1,000 2,390 27,468 36,581,402

5.1.4 Dashes

Typewritten manuscripts may contain two forms of dashes: the en dash (-) and the em dash (—).

Use the en dash as a hyphen in compound words and for word divisions at the end of a line.

Use an em dash to separate a subordinate explanatory or emphatic phrase from the main part of the sentence. In general, em dashes may be substituted for parentheses, but they can be confusing if overused. In typing the em dash for this use, leave no space before or after it. For example:

Their ability to pursue successfully their economic development objectives irrespective of sector orientation--public or private--is thereby hampered.

An em dash followed by two spaces may also be used to set off items in a vertical list. However, this method of presentation should be used sparingly, if at all, in short text. For example:

International cooperative principles stipulate that a cooperative embrace the following practices:

- *One person, one vote*
- *Control by membership*
- *Continuing education*

5.1.5 Ellipses

Use a series of three dots (...), an ellipsis, to indicate that words have been omitted within a quoted sentence. If the ellipsis closes the sentence, add a period (making four dots) before the closing quotation marks. Four dots are also used to indicate the omission of the first part of the next sentence within a quotation or of a whole sentence or paragraph. Ellipsis dots are not customarily used to introduce a quotation because the existence of text preceding a quotation is generally assumed. For example:

According to The Chicago Manual of Style, "any omission of a word or phrase, line or paragraph, from within a quoted passage must be indicated by ellipsis points (dots)... never by asterisks...."

5.1.6 Italics (Underlining)

~~In most cases, italic type is not used in typewritten or word-processed material; instead, the relevant word or words are underlined. Thus, in the following rules for use of italics, the word "underline" has been substituted for "italicize."~~

~~Underline~~ titles of books, pamphlets, proceedings and collections, newspapers, magazines, and reports that are issued separately. (Enclose the titles of articles or sections of a publication in quotation marks.) For example:

"Fertilizer Policy in Korea," in Journal of Rural Development,

ARTS/FARA adaptation:

Contrary to section 5.1.6, italics (not underlines) should be used for titles of books and journals, unfamiliar foreign words, and words that require special emphasis.

Parentheses and Brackets

Underline words to give them special emphasis:

The technique was deceptively simple: the implementing agency simply refused to act like a patron.

However, overuse of this kind of emphasis is distracting and negates its effectiveness.

Underline individual words and phrases in a foreign language if they are likely to be unfamiliar to readers. An English translation in parentheses should follow the first use of the foreign word. For example:

Making the adjustment from life in the semi-arid altiplano (highlands plateau) to life in the tropical rain forest is difficult.

However, do not underline foreign words that are in common use in English, such as the following:

*elan a priori de facto
et al. ad hoc ex post*

5.1.7 Parentheses and Brackets

Parentheses. Parentheses, like commas and dashes, may be used to set off amplifying, explanatory, or digressive elements in a sentence. When these elements are closely related to the rest of the sentence, use commas; for more distantly related elements, use parentheses or dashes. Note the following examples:

Per capita farm income (in current won [W]) rose from W93,000 in 1963 to W1.4 million in 1977.

These three elements constitute the agricultural and rural services (and surveillance) system.

Use parentheses to enclose numbers or letters marking the parts of a series:

Since 1970, the Government has supported a dual price structure for three reasons: (1) to hold down urban consumer prices, (2) to provide production incentives, and (3) to minimize swings in grain prices.

If a sentence fragment enclosed in parentheses ends a sentence, place the period terminating the sentence outside the closing parenthesis:

Data were collected during a 2-week period (during the in-country phase of the evaluation).

However, for a complete sentence enclosed in parentheses but not a part of another sentence, place terminating punctuation inside the closing parenthesis:

Production increased from 1965 to 1981. (Although rice self-sufficiency was only temporary, Korea is now self-sufficient in barley because of lowered demand.)

Unless there is a reasonable chance that the numbers may be confused, do not follow a written-out number with a figure in parentheses. This is a superfluous usage that interferes with a flowing, readable text.

Brackets. Use brackets to enclose parenthetical material that is already within parentheses, as in the following example:

Others argue that traditional forms of cooperation (such as kye [mutual credit societies] and labor-savings activities) already existed.

Use brackets to enclose editorial comments or clarifications in quoted material:

"The evaluation team concentrated on examining the RECs [regional education centers] and pilot rural schools." ("RECs" is retained but is defined in brackets.)

or

"The evaluation team concentrated on examining the [regional education centers] and pilot rural schools." ("RECs" is replaced with its full name in brackets.)

Punctuation with brackets follows the rules for parentheses.

5.1.8 Quotation Marks

Enclose a direct quotation of five typed lines or fewer in double quotation marks inside the sentence:

According to The Chicago Manual of Style, copy editing "requires close attention to every detail in a manuscript...."

Internal quotation marks within a quoted phrase are always single quotation marks ('like this') never double.

Indirect quotations do not require quotation marks:

The Chicago Manual of Style states that copy editors should pay close attention to every detail of a manuscript.

Indent five spaces from each margin and set off from the text quotations of more than five lines. Do not use quotation marks. For example:

The Chicago Manual of Style is worth quoting:

Material set off from the text as a block quotation should not be enclosed in quotation marks. Any quoted matter within a block quotation should be enclosed in double quotation marks, even if the source quoted uses single marks.

Place commas and periods within the closing quotation marks, whether they are part of the quotation or not:

"When we first arrived," he said with a wave of his hand that included all the area before us, "this was all jungle."

Place final punctuation other than commas and periods within the closing quotation marks only when it is part of the quoted material:

The Bangladesh country study referred to the role of the PL 480 Title I program in ensuring "a minimally adequate level of food consumption"; this goal seems to have been met.

Place quotation marks before footnote numbers:

His policies were intended to "rescue the shaky U.S. dollar."⁷

Set off in quotation marks words used in a special sense (use double quotation marks unless the word is within a phrase already in quotation marks):

The new settlement pattern is a great improvement over the earlier, "piano key" settlement design.

Numbers

Place in quotation marks letters, numbers, and words used as "words":

The confusion resulted from the use of the word "survey" for "study."

5.2 Spelling

This category includes not only the correct (or preferred) spelling of words but also the rules governing the use of figures or the spelled-out form of numbers. The standard guides for spelling and meaning are Webster's Third New International Dictionary (unabridged) and Webster's New Collegiate Dictionary. If two or more spellings are given for a word, the first listed spelling is to be used.

5.2.1 Numbers

Whether to use a figure or to spell out a number is often a vexatious problem. The guidelines below should clarify some of the difficulties.

In general, spell out numbers under 10, except when they express units of time, money, or measurement:

six countries nine reports

Always spell out numbers at the beginning of a sentence, but try to avoid opening a sentence with a number larger than 100:

Fifteen schools were constructed.

In 112 countries,....

Spell out round numbers and indefinite expressions:

about one hundred dollars

thousands of dollars

Spell out fractions standing alone or followed by "of," but use the fraction in a unit modifier:

one-half of an inch 1/2-acre plot

Spell out ordinal numbers lower than 10th:

*First Congress Third Street
sixth century*

Use figures for cardinal numbers of 10 or greater and for ordinal numbers of 10th or greater:

19 goals 10 outputs 13,855 editors

*This is the 11th time he has
rewritten the report.*

Use figures for units of time, money, or measurement, as in the following examples:

— age: *6 years old 7-year-old
girl*

— mathematical expressions: *mul-
tiplify the result by 5*

— measurements: *7 hectares
3 kilometers 8 by 12 inches*

— percentages: *25 percent
a 3-percent change* (note also
that the word "percent" is used,
not the symbol "%")

— time: *6 hours 4 years
8 p.m. (not 8:00 p.m.)*

Use figures for a series of four or more numbers, even if all the numbers are lower than 10:

*The correct responses were 3, 5,
7, and 9.*

Use figures in a sentence for a related group of numbers if at least one of them is 10 or higher:

Each of 15 major commodities (9 food and 6 nonfood) was produced domestically.

but

Each of nine major commodities (five food and four nonfood) was produced domestically.

The use of figures does not affect the application of general rules for nonrelated numerical expressions:

Group interviews were conducted with six to eight participants in each area during the 2 weeks the team was in the field. (not with 6 to 8 participants in each area during the 2 weeks....)

Unless there is a reasonable chance that meaning may be misconstrued, do not interrupt the flow of text by following a spelled-out number with a figure in parentheses.

5.2.2 Plurals and Possessives

Form plurals of capital letters, figures, and abbreviations of proper nouns using "s" alone, without an apostrophe, unless indicating possession:

the 1960s the three Rs
five YMCAs A.I.D.'s resources

Form plurals using apostrophe and "s" for abbreviations with periods, lowercase letters, and other cases where "s" alone would be confusing:

two Ph.D.'s in the form of t's

The formation of some plurals causes difficulty because of differing conventions when forming plurals of words of

foreign origin, especially Latin and Greek. Some words retain the foreign plural form, whereas others have been Anglicized. Some examples:

alumnus, alumni
analysis, analyses
crisis, crises
criterion, criteria
curriculum, curricula
datum, data
hypothesis, hypotheses
minutia, minutiae
parenthesis, parentheses
phenomenon, phenomena
radius, radii
stimulus, stimuli
synopsis, synopses

but

appendix, appendixes
focus, focuses
formula, formulas
forum, forums
index, indexes (indices in mathematical usage)

The possessive case of singular nouns is formed by the addition of an apostrophe and an "s"; the possessive of plural nouns ending in "s" is formed by the addition of an apostrophe only. Note that proper nouns ending in "s" follow the same rule requiring addition of an apostrophe and an "s" as do other singular nouns. Some examples:

Ross's report FIDES's response
girls' dresses

5.2.3 Hyphenation of Compound Words

How to form compound words vies with the problem of when to spell out a number as the most convoluted and vexatious stylistic convention. Basically, a compound word implies a meaning different from that conveyed by each word considered separately. Temporarily formed compound words usually

Compound Words

require a hyphen; some other compounds require hyphens for clarity or readability. Some compounds have been in common usage so long that they are now written as one word. Still other compound words that appear in their regular order and cause no ambiguity in sense or sound are written as separate words in the text. For example:

training program costs
high school student

There are some general rules that can provide guidance in the formation of compound words.

1. Do not use a hyphen to separate standard prefixes (co, dc, re, non, pre, pro, sub, anti, inter, intra, macro, micro, over, semi, socio) or suffixes (fold, like, most, ward, wide, wise) from the words they modify:

<i>anticyclical</i>	<i>nonproject</i>
<i>coauthor</i>	<i>macroeconomic</i>
<i>cooperate</i>	<i>micropolicy</i>
<i>clockwise</i>	<i>overstaffed</i>
<i>fourfold</i>	<i>prewar</i>
<i>interagency</i>	<i>reinvent</i>
<i>intramural</i>	<i>semiarid</i>
<i>lifelike</i>	<i>socioeconomic</i>
<i>nationwide</i>	<i>subproject</i>

-- Exception: Hyphenate to avoid doubling a vowel or tripling a consonant (except with prefixes of two or three letters):

anti-inflationary
bell-like
brass-smith
semi-independent
preexisting

-- Exception: Hyphenate prefixes before proper nouns or numbers:

non-European
un-American
post-1918

-- Exception: Hyphenate to avoid ambiguity:

re-creat~~e~~ (rather than "recreate")
re-cover (rather than "recover")

-- Exception: Hyphenate with the prefixes "all," "ex," "quasi," and "self":

all-important
ex-major
quasi-legal
self-motivated

2. Use a hyphen between words combined to form a temporary unit modifier immediately preceding the word modified, particularly for compounds containing participles:

drought-stricken area
lump-sum payment
French-speaking nation
high-yielding variety
long-term project
a 4-percent increase
U.S.-owned property

-- Exception: Do not use a hyphen when the elements of the unit modifier are proper nouns, words in quotation marks, or foreign terms:

Latin American countries
ex post evaluation
"good neighbor" policy

-- Exception: Do not use a hyphen when the first word is an adverb because adverbs cannot modify nouns. (There should be no confusion over modification because the adverb must modify the following participle or adjective.) For example:

highly developed skills
quickly implemented program
closely guarded plan

3. Do not use a hyphen with a temporarily formed compound predicate adjective; in such cases modification is sufficiently clear that the hyphen is not needed to avoid ambiguity:

*The effect was far reaching.
The area is drought stricken.
The impacts were long term.*

4. A few compound words are formed by using a virgule (/) instead of a hyphen. These compounds should be limited to combinations of two nouns that represent different but equal functions, such as the following examples:

*programmer/analyst (plural:
programmer/analysts)
writer/editor (plural: writer/
editors)*

5. In general, compound verbs are not hyphenated even when their related noun form is hyphenated or closed up; however, there are exceptions, so they must be checked in a dictionary. Some examples:

<i>build up</i>	<i>follow up</i>
<i>blue-pencil</i>	<i>overrate</i>
<i>carry on</i>	<i>upgrade</i>
<i>cross-brace</i>	

Even the general rules for compound words provided above have many exceptions. If in doubt, check the current U.S. Government Printing Office Style Manual, which has a comprehensive list of compound words. A dictionary can also provide guidance.

5.2.4 Indefinite Articles

Use "a" before words beginning with consonants, except words beginning with a silent "h." Also use "a" before words spelled with initial vowels but beginning with a consonant sound such as "y" or "w." Use "an" before words

beginning with vowels and words beginning with silent "h." Some examples:

<i>a European</i>	<i>an A.I.D. study</i>
<i>a historian</i>	<i>an FCC ruling</i>
<i>a union</i>	<i>an hour</i>
<i>a one-sided task</i>	<i>an initial</i>
<i>a U.S. goal</i>	<i>an order</i>

5.3 Usage

5.3.1 Jargon

The proper use of words should be a hallmark of A.I.D. publications. A misused word or part of speech damages the credibility of the document and confuses the reader.

Whereas no one would argue with the need to avoid misusing words, not every writer is sensitive to the need to avoid jargon. Be wary of the latest catchword or jargon in your field. In many cases, the jargon used effortlessly among people deeply involved in a specialized field can become ludicrous or tedious on paper.

New words or expressions should be used only when they define new concepts, and technical expressions should be used only when the precision they provide outweighs any confusion they might cause.

5.3.2 Personification

Just as one may say "the Chair recognizes the delegate from Maryland," one may say "A.I.D. will gather information." This is personification. It is not only acceptable usage but almost unavoidable. However, exercise caution in attributing statements or findings to U.S. Government agencies; make clear distinctions between what are personal conclusions and what is Government policy.

Collective Nouns, Frequently Misused Words

5.3.3 Collective Nouns

Collective nouns are singular in form but refer to a group of objects, persons, or acts (for example, "team," "staff," "jury," "committee," "army"). Whereas subject-verb agreement for other nouns depends on whether the form of the subject is singular or plural, for collective nouns subject-verb agreement depends on meaning or intent. Collective nouns take a singular verb when the intent is to emphasize the group as a unit, but a plural verb when the emphasis is on the individuals of which the group is composed. Notice the different emphasis in the two following examples:

The staff, (as a unit) was criticized for its inappropriate conclusions.

The staff (as individuals) have journeyed from all parts of the country to attend the meeting.

To avoid any confusion as to intent, the word "members" can often be added after the collective noun when the intent is to consider the individuals rather than the unit:

The team members prepare all impact evaluation reports.

5.3.4 Frequently Misused Words and Expressions

The following list provides a brief treatment of some commonly misused words and expressions and provides an explanation of their proper use.

affect As a verb, "affect" means "to influence"; as a noun, it means "the subjective aspect of an emotion."
effect As a verb, "effect" means "to bring about"; as a noun, it means "result."

alternate "Alternate" means "first one and then the other."
alternative "Alternative" means "one without the other"--one of two or more things or propositions to be chosen.

among "Among" shows a relation of more than two people or objects.
between "Between" refers to a relation of only two people or objects.

and/or In most cases this is an ambiguous or wordy substitute for a simple "and" or "or."

They provided training in supervising facilities and/or operations. (vague)

They provided training in supervising facilities and operations. (precise)

anticipate "To anticipate" is to prepare for or act in advance on something.
expect "To expect" an event is to think that it will occur.

appraise "To appraise" is to set a value on something; "to apprise" is to inform.

around "Around" is often used mistakenly for "about."

The delay will be about [not "around"] 2 weeks.

as To avoid confusion, do not use "as" to mean because. Notice the ambiguity of the following sentence:

As the negotiations were nearing an end, some of the delegates remained in Zurich for the weekend.

They established procedures to ensure the quality of the report.

The loan was fully insured.

as
like

When used to mean "resembling or similar to," "as" is a conjunction and "like" is an adjective or preposition. "As" precedes phrases or clauses, whereas "like" is used before nouns and pronouns.

believe
feel

"Believe" implies thought; "feel" implies emotion. Unless emotion rather than thought is intended, use "believe," not "feel."

beside
besides

Do not confuse "beside," which means "by the side of," with "besides," which means "in addition to."

One was just like the other.

He acted as if he were the leader.

Besides his other duties, he was expected to remain beside the road to oversee repairs.

as to
as to
whether

"As to" is a clumsy construction for which a single preposition, usually "of" or "about," should be substituted.

between...or

"Between" is used to compare one thing "and" another, not one thing "or" another.

He was uncertain about [not "as to"] which word to use.

She could not decide whether [not "as to whether"] to go or to stay.

They had to choose between reviewing one project thoroughly and [not "or"] reviewing several projects superficially.

assure
ensure
insure

"Assure" means "to confirm, convince, or remove doubt." Although both "ensure" and "insure" mean "to make certain, to guarantee," "ensure" is preferable in this sense because "insure" has taken on the special meaning "to guarantee life or property against risk."

between...to

"Between" should not be used as a substitute for "from."

The project review will take from [not "between"] 2 to 4 weeks.

both

"Both" is often used unnecessarily. If its use is required for clarity, it should be placed as close as possible to the terms it encompasses to avoid confusion such as the following:

We were assured adequate transportation to the site.

Frequently Misused Words and Expressions

	<p><i>We will be both contacting informants by phone and by letter.</i> (incorrect)</p> <p><i>We will be contacting informants by both phone and letter.</i></p>		
compare to compare with contrast	<p>"Compare to" is used to point out resemblances between objects of different orders. "Compare with" is used to point out differences and similarities between objects of the same order or class. "Contrast" is always used to point out differences.</p> <p><i>Chaucer compared life to a pilgrimage.</i></p> <p><i>We compared the old settlement pattern with the new one.</i></p> <p><i>He contrasted life in the highlands with life in the tropics.</i></p>		
compose comprise constitute	<p>The whole is composed of or comprises its parts; the parts constitute the whole. The parts may constitute the whole, but the parts may never comprise the whole and the whole is never comprised of its parts. Conceptually, "comprise" means the same as "includes all the parts of."</p> <p><i>The report is composed [not "comprised"] of five sections.</i></p> <p><i>The report comprises five sections.</i></p>		
		continual continuous	<p><i>These five sections constitute [not "comprise"] the report.</i></p> <p>"Continual" means "frequently, closely repeated, or continuing at intervals"; "continuous" means "continuing without interruption."</p> <p><i>Writing well requires continual practice.</i></p> <p><i>The watch ran continuously until its spring wound down.</i></p>
		data	<p>The word "data" is the plural form of the singular noun "datum" and therefore always takes a plural verb. Data are. Data were. Data have been.</p>
		different than	<p>The preferred form is "different from."</p> <p><i>Our presentation was different from [not "than"] theirs.</i></p>
		disinterested uninterested	<p>"Disinterested" means "unbiased, impartial." "Uninterested" means "not interested, indifferent."</p> <p><i>We tried to maintain a disinterested approach to the project review.</i></p> <p><i>They were uninterested in the results.</i></p>
		due to	<p>An excellent rule of thumb in determining when "due to" (synonymous with "attributable to") may be properly used is that it should be</p>

immediately preceded by a linking verb such as "be," "become," "appear," or "seem." If it is not, the construction is incorrect and "because of," "on account of," or "through" should be substituted

He was exhausted because of [not "due to"] overwork.

His exhaustion was due to overwork.

he/she
he or she
they

An entirely satisfactory solution has not yet been found to the problem of gender bias in the use of pronouns. Of the solutions available, the least disruptive to the flow of text is to recast singular pronouns as plurals. When that is not appropriate, the "she or he," "his or her," and "her or him" constructions are more natural and readable than those using a virgule (/).

An employer should always be sensitive to his/her employees' feelings. (awkward, but preferable to using "his" alone)

Employers should always be sensitive to their employees' feelings. (better)

Do not attempt to evade the problem by using a plural pronoun to refer to a singular noun. Using an incorrect grammatical construction is obviously not an acceptable solution to the problem of gender bias.

Each author must submit a glossary with their report. (incorrect)

Each author must submit a glossary with his or her report. (better)

Authors must submit a glossary with their report. (better)

endemic
epidemic

"Endemic" means prevalent in a given area or society; "epidemic" means spreading rapidly through a population or area.

etc.

"Et cetera" is a Latin expression meaning "and so on." Although "and so on" is preferable to "etc.," both terms should be used as little as possible in formal writing. Their use should be limited to a clearly understood extension of a set of things or activities or to indicate the repetition of a series already enumerated. "Etc." is redundant at the end of a list introduced by "such as" or "for example."

fewer
less

"Fewer" applies to numbers or things that can be counted. "Less" applies to mass or quantity.

We had fewer problems this time, so the project required less time to complete.

Frequently Misused Words and Expressions

- hopefully** *“Hopefully” and “importantly” are adverbs and as such can modify only verbs, adjectives, or other adverbs. They are frequently used incorrectly, making the grammatical meaning different from the intended meaning because of the rule of adverb modification. “Hopefully the project will continue” means that the project will continue in a hopeful manner, not that the author hopes that the project will continue.*
- importantly** *The farmers are expanding their farms into new fields.*
- in order to** *This phrase is often just deadwood and should not be used except to avoid confusion in modification.*
- impact** *It is correct to use “impact” as a noun (“to have an impact on” something), but it is preferable not to use “impact” as a verb (“to impact on” something). The use of “impact” as a verb to mean “affect” or “influence” is bureaucratic jargon and should be avoided by substituting the word “affect,” “influence,” or “change.”*
- in** *“In” implies position or condition. “Into” implies movement to the interior of something.*
- into** *This report is divided in [not “into”] two parts.*
- more importantly** *“More importantly” is an adverbial phrase that is often used incorrectly. In almost all cases the correct phrase is “more important,” with the implied meaning being “what is more important,....”*
- number is** *When preceded by “the,” the word “number” takes a singular verb; when preceded by “a,” it takes a plural verb.*
- number are** *They established a committee of senior Government officials in order to plan the use of Title I sales proceeds. (wordy)*
- ize** *They established a committee of senior Government officials to plan the use of Title I sales proceeds. (better)*
- more importantly** *Do not create new words by adding the suffix “ize.” Words such as “projectize,” “indigenize,” and “operationalize” are distracting to readers. Even words that have become commonplace in academic or bureaucratic speech, such as “finalize” and “prioritize,” should be avoided and replaced by “complete” or “rank.”*

	<p><i>The number of completed reports is small.</i></p> <p><i>A number of reports are incomplete.</i></p>		<p><i>You shall go to Honduras tomorrow. (emphatic)</i></p> <p><i>Shall I go to Honduras tomorrow? (interrogative)</i></p>
on upon	<p>Avoid using "upon"; "on" is usually sufficient and more precise.</p> <p><i>The decision depends on [not "upon"] our findings.</i></p>	since	<p>The core meaning of this conjunction relates to time. To avoid confusion, its use should be reserved for such meaning. It should not be used to mean "because."</p> <p><i>Since her trip to San Julian, she has not returned to Bolivia.</i></p> <p><i>Because [not "since"] she was 16, she was able to get her license.</i></p>
percent percentage	<p>"Percent" means "number of units out of each hundred" and follows a number. Except to conserve space in a table, the word "percent" is used, not the symbol "%." "Percentage" means "a portion, a fraction" and is used when a precise amount is not indicated.</p> <p><i>7 percent of firms</i></p> <p><i>a large percentage of firms</i></p>	systematic systemic	<p>"Systematic" means "relating to or consisting of a system, or methodical in procedure." "Systemic" means "affecting an entire organism or organization."</p>
presently	<p>The use of "presently" should be limited to its meaning of "in a short time, soon." To avoid confusion, it should not be used to mean "currently" or "now."</p>	that which	<p>"That" introduces restrictive clauses (clauses essential to the meaning of a sentence). "Which" introduces nonrestrictive clauses (clauses that merely supplement information in a sentence). Nonrestrictive clauses should be set off from the sentence by commas.</p> <p><i>The report that we received yesterday was due last Friday.</i></p> <p><i>The report, which has several sections, is due next Friday.</i></p>
shall will	<p>In general usage, "will" has become the prevailing form in most instances to indicate future tense. "Shall" is generally limited to emphatic future forms and interrogatives.</p> <p><i>I will go to Guatemala after I return from Honduras.</i></p>		

Frequently Misused Words and Expressions

thusly "Thusly" is an improper form of the word "thus."

utilize There is little justification for the use of the awkward word "utilize" when "use" is intended; "utilization" should also be avoided.

when and if Use one or the other but not both. "When" implies greater certitude than does "if."

while "While" means "during the time that." It should not be used to mean "and," "whereas," or "although" because the result is often confusing, as these examples demonstrate:

I was born in the United States while my mother was born in England. (confusing)

The report is being typed today while it is due tomorrow. (confusing)

who
whom "Who" and its compound forms are used as the subject of a sentence; "whom" and its compounds are used as the complement of a verb or the object of a preposition.

Give the report to whomever you wish.

Who is the team leader?

Whoever did not receive the memo should be excused.