REL Program

Writers Guide and Style Guide

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Contents

This two-part Writers Guide and Style Guide provides information on National Center for Education Evaluation and Regional Assistance (NCEE) standards and expectations for Regional Educational Laboratory (REL) writing. Part I lays out principles for clear, concise, and engaging writing. Part II summarizes style guidelines to make writing more consistent. The guide includes worksheets that summarize some of the techniques for making writing clearer and more engaging and provide an opportunity to practice them. We hope that report authors and other REL staff will refer to this guide to improve their communication with their intended audience and to help them meet NCEE expectations.

Part I. Writers Guide

You've done the research, and now you are ready to write the report. By this time you have finalized your analysis methods and conducted precise analyses of your data. Now your focus shifts to conveying the findings clearly and compellingly to your potential readers. Most NCEE reports are intended for educators and policymakers, which affects how you write your report. Making your findings accessible to educators and policymakers does not mean sacrificing scientific rigor. It means engaging the reader, concentrating on the research questions and findings, and framing discussions of data and methods in ways that are appropriate for the intended audience.

Writing an effective report takes more than sitting down with your notes and starting to write. It involves clarifying your purpose and expectations, planning what you will write in some detail, and only then composing the report. Each of these steps is described below. Following them will help you write a better, more engaging report. And it will help you do it faster.

Clarifying purpose and setting expectations

Researchers accustomed to writing for other researchers might initially find it difficult to write for educators and policymakers. But a few easy steps can help you shift the focus and tone of your report. To begin, ask yourself some simple questions to clarify your purpose and set readers' expectations (see worksheet 1). Among the key questions are these:

- What is the topic of the report?
- What is its objective?
- Who is going to read it?

Be clear about what you are trying to say. You want to convey to readers the research questions you sought to answer, the answers you found, and why those answers matter. The goal is to move seamlessly from the research questions to a well-crafted narrative that communicates the findings and their importance and puts them in a relevant context for readers. To clarify your own thinking, you need to be able to express the main topic or messages in one or two sentences and to devise a working title that conveys that message. The title may change later, but stating it clearly from the beginning will help keep the report on track.

Know your audience, and prepare to write accordingly

With few exceptions, NCEE reports are intended primarily for educators and policymakers who can use the findings to inform their practice and decisions. Writing for this audience is different from writing for other researchers, who may be interested primarily in *how* you conducted your study. Educators and policymakers are more interested in *what* you found. They need rigorously derived, relevant evidence from technically sound education research on which to ground education practice and policy. By clearly identifying your questions and your answers, your report can help improve education outcomes for students. To do that, you must write to engage your audience.

You want your readers to take away the key messages of your report, and that won't happen if the messages are buried under a lot of other information. That means that your report should focus on the findings of your study and how they apply to the concerns of educators and policymakers. These readers need just enough information in the body of the report about how the study was conducted to provide context and confidence that the findings are evidence-based. Including too much information about data and methods will interrupt the narrative flow and risk losing your primary audience. Details on data collection, data cleaning, and study methods can be placed in an appendix, where they are available to those whose interests include methodology.

Decide how long the report will be, and how much time you can spend writing it

The main body of most research reports should be no more than about 20 single-spaced pages, including about 4–6 figures and 4–6 tables, so choose what you write carefully. While you will be tempted to include everything you found and to explain everything you did to reach your conclusions, remember that your readers have many competing demands on their time. Place details on data and methodology, as well as more finely disaggregated findings, in appendixes, but keep these as brief as possible. Place references after appendixes. Generally, you should include only sources cited in the report.

The time you have to write the report is also constrained. If you spend a little more time planning your report, the writing will be much easier—and faster.

Think about how study type affects the kind of report you write

The type of study you conduct can influence how your report unfolds. You should also consider how your report might become part of a suite of related products that include short companion pieces (box 1).

Box 1. Product types for reports published by the National Center for Education Evaluation and Regional Assistance

Not every research product will fit neatly into one of these study types, but the categories should help you to think about the goals and audience for your report.

- *What's happening?* Descriptive studies involving baselines and trendlines, implementation or service use, and statistics and qualitative work describing the experiences of individuals, groups, and programs.
- *What's known?* Studies on the current state of knowledge, such as literature reviews, systematic reviews, and meta-analyses.
- *Making connections.* Correlation studies. This type of study requires care in conceptualizing the research questions and communicating the findings, to avoid giving an impression of claiming causal impact.
- *Making an impact.* Experimental design studies that permit asserting causal relationships. Impact studies might include large-scale evaluations or smaller scale studies, such as studies of practices in individual districts.
- *Applied research methods.* Studies describing strategies for conducting research in applied settings. RELs with lessons to share about their applied research work could, for example, describe the methods used to link a database or strategies for encouraging schools or districts to participate in a study.
- *Stated briefly.* For technically complex reports of greater than average length, it may be appropriate to produce short companion products (briefs) of around 10 single-spaced pages that summarize the findings for specific audiences. For example, a REL might create one companion brief for educators and another for parents.
- *Tools.* Guidance for planning, gathering, analyzing, or reporting data or research.

Planning the report

Now you are ready to plan your report in more detail. The worksheets at the end of this guide can help you plan more systematically and develop a detailed outline.

Articulate your main and supporting messages

The most important question about any piece of writing is this: what is the main message you want to convey? Answering this question forces you to boil down into one clear statement everything you have found in your study and everything you hope to convey to readers. You may need to articulate three or four supporting messages as well (see worksheet 2).

Frame your main message and supporting messages in 25–30 words each. Without this step, your writing will lack focus. You want to build a hierarchy: main message, supporting messages, points (one to a paragraph), and then details, examples, and comments. As you work out your supporting messages, decide how to arrange them. Be as clear, explicit, and concise as you can. If you do this part well, you will have worked out the structure of your report.

Decide on your line of argument and how to develop it

Now that you have identified your main and supporting messages, think about how you want to present them to readers. This will determine your line of argument. Your supporting messages divide your argument and can become the conceptual architecture that informs your outline. Determining the order of the messages also suggests ways of arranging the material, such as dividing a problem into its parts or moving from the general to the specific (see worksheet 3). One structure that works for many research reports is the following (example 1):

Example 1. Sample report structure

Explain an issue or question

What issues or research questions you addressed

What you did to learn more (very briefly)

What you found

What the findings mean for practice and further research

Any important limitations of the study or findings

Think of your report as a story that should capture and hold the interest of your readers. Make a compelling case for your research questions and findings. Use concrete examples to engage your readers. Describe possible implications of your findings, and explain why they might be important.

Stories can have any number of structures, but four common ones are:

- *Building blocks.* Presenting points in the order readers will find most interesting is often the best way to organize a report that pulls together multiple elements that build to a whole.

- *Inverted pyramid.* Ranking your information/findings in order of importance or from the broadest point to the finest detail is useful to reach busy readers who might not be able to stay with the story to the end. No matter where they stop reading, they will have absorbed the most important parts of the story.
- *Alternating viewpoints.* Alternating between general observations and specific information is a good way to keep a reader's attention. Try beginning with an anecdote, followed by a discussion of the issue the anecdote typifies. Or start with a vignette and then deconstruct it.
- *Chronology.* People are naturally curious about how events unfold, and a chronological structure encourages them to stay to the end. But this structure requires a story with interesting twists and turns. It is not generally effective for looking at broad issues.

Decide on headings and subheadings

You should generally use the main and supporting messages as headings and subheadings in your report. Keep balance in mind by aiming for a fairly even distribution of text across sections and subsections. While not all sections will be the same length, avoid disproportionately short or long sections.

Once you have decided on the main headings and subheadings, you can infuse them with meaning (rather than making them purely descriptive), to give your readers a quick sense of the report's contents (see example 2 below). Readers should have several different ways to absorb a report's contents, and skimming the headings should give them a reasonably good overview.

Develop a detailed, paragraph-by-paragraph plan

You have a rough idea of how many pages the final report should have (usually no more than 20 single-spaced pages for the main body of the report) and the number of sections based on your supporting messages and line of argument. Estimate how many paragraphs each section should have, knowing that you can get about four to five paragraphs to a single-spaced page. You can now assign a topic or point to each paragraph (see worksheet 4). You won't get the topics just right the first time. As you begin to write, you will divide or collapse many topics.

Composing the report

You are now ready to write. You've already done much of the work by preparing your paragraph-by-paragraph plan.

Use your main message and supporting messages to frame the report

State your main messages and supporting messages at the beginning of your report. In this way, you begin to shape readers' expectations about what they will find in the report.

Write, following the plan you developed

Here are some general guidelines for crafting effective paragraphs:

- Unify the paragraph around one point, and state the point in a prominent place. Either lead with the point or place it at the end of the paragraph and build up to it.
- Keep the paragraphs short, so that the steps in your arguments are visible and easy to follow. Most paragraphs should be no more than 10–12 lines, or about five sentences. But vary the length to avoid monotony. An occasional one- or two-sentence paragraph can emphasize an important point. And complex points can sometimes require a longer paragraph.
- Vary paragraph structure. Lead with a question and answer it. Present two sides of an issue. Or begin with a premise and then undermine it, to show why it is wrong.
- Bind the paragraph's sentences in a linear flow. Make every sentence bear on the point. Repeat a key word or phrase. Count the parts (announce and number the steps in a process). And link sentences by signaling what is to come.
- Link your paragraphs by repeating a word or phrase from the preceding paragraph, ordering paragraphs chronologically, or ending a paragraph with a question that you answer in the next one.

Enlist all report elements to advance your narrative

All report elements (title, headings, and titles of tables, figures, and boxes) can be marshaled to advance your report's messages. Here are some headings that convey the report's messages (example 2):

Example 2. Headings that convey contents

Academic and graduation outcomes for re-enrollees are mixed

Re-enrollees fared better than permanent dropouts in course completion and credit accumulation

One-third of re-enrollees failed to complete even one course after re-enrollment

A majority of re-enrollees did not earn enough credits to graduate

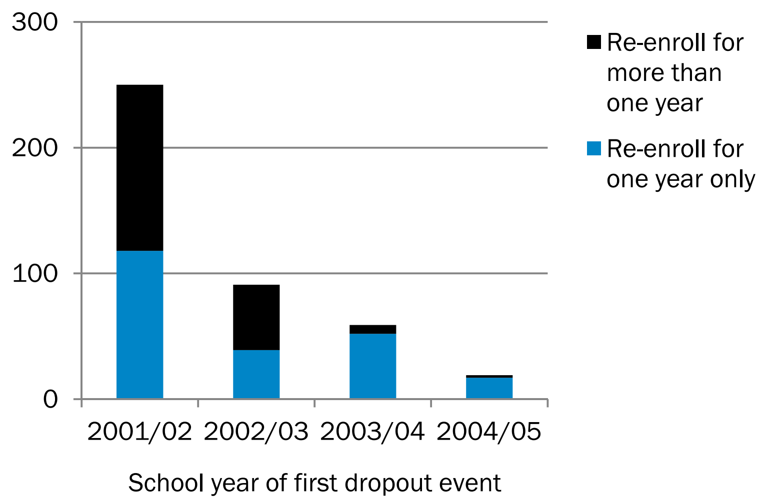
Nearly one-fifth of re-enrollees graduated from high school

And here is a figure with a title that directs readers to the figure's main point (example 3):

Example 3. Figure title that highlights the main point

Figure 3. More than half of re-enrollees returned to school for only one year

Re-enrollees



Source: Authors' analysis based on San Bernardino City Unified School District, Department of Research/Systems Analysis, enrollment data for the 2001/02 grade 9 high school cohort, personal communication, June 14, 2007.

The title makes a point that would not be entirely obvious just by glancing at the figure. It directs readers to the main finding the figure is illustrating, which they might not otherwise discern without additional computation or contemplation.

You can also add explanatory captions to figures to point readers toward what is important.

Keep the main text focused on the messages/findings

To reach your primary audience of educators and policymakers, use the main report to highlight your questions and findings. Use appendixes for any extended literature reviews, detailed explanations of data and methodology, and detailed technical results.

Consider these report attributes

Keep the following attributes in mind when writing your report. These qualities will make your report more readable and engaging.

Keep it short

People are busy. They can find an hour to read a 20-page report whereas they might not even start one that is 100 pages long. Keeping it short also makes the messages stand out—if you don't bury them. You don't need to tell readers everything you have found and everything you did to find it—just the parts you particularly want them to take away from the report. Place the extra details in appendixes, where those with the time and interest can read more.

Keep it light and simple

Your language, tables, and figures should be straightforward, without undue complexity. Unpack dense sentences, paragraphs, and pages.

Keep sentences and paragraphs short, so that readers can grasp the point quickly even if they only have time to skim the report. Be brief unless there is a good reason not to be. Keeping most sentences to 20 words or fewer and paragraphs to 10–12 lines will help your readers follow what you are saying. Break long sentences into two or more shorter ones. Trim the fat from your sentences, removing excess words that slow the delivery of your point (for example, change "in the field of social studies" to "in social studies" or "do a study of the effects" to "study the effects"). Pare tables and figures down to their essential information—but keep enough detail to ensure they can be understood without reading the report. Avoid the trap of including all the data you've collected, which will obscure the message you want your table or figure to express. Lighten up dense pages by adding more headings or a table or figure, if appropriate.

> Note: Although titles that provide messages about the key takeaways are preferred, in some cases it may not be appropriate. Figures more than tables benefit from titles that guide readers to the key point they illustrate; otherwise, readers tend to simply glance at the figure without taking away the key message. Tables tend to be more expansive in their contents and less amenable to message-type titles.

Avoid jargon and abbreviations

Not all readers will be as familiar with jargon and abbreviations as you might think they are. Jargon and abbreviations suggest to readers that the report is for specialists only—for those who know the secret code words. Be inclusive and welcoming by avoiding such language. But use technical terms when needed for precision, and define them, either when they first appear or, if there are more than a few, in a box of key terms.

Occasionally remind readers of the definition by including a shortened form in the discussion.

Use terms consistently

Use the same word for the same concept or thing each time. Don't say "English learner students" on one page and "non-English proficient students" on another, or "intervention group" on one page and "treatment group" on another. You'll distract readers, who may wonder whether these terms refer to the same groups or have different meanings.

Minimize use of first person

Writing from the first person point of view can sometimes weaken the credibility of a report by making it sound as though the work is based on personal opinion. Readers want to know what you found. They don't want you to insert yourself into each sentence. Instead of "Although we found that gender gaps were statistically significant for both grades, the differences were substantively small," try "Gender gaps were statistically significant for both grades, but the differences were substantively small." Or instead of "We present histograms of three characteristics in three states to clarify the distributions," try "Histograms of three characteristics in three states display the distributions." In some cases, using the first person to describe personal experience can add concreteness and authority, but such instances are rare in research writing, and each case needs to be evaluated carefully.

Prefer the active voice to the passive

The active voice tends to be more direct and economical than the passive voice and therefore stronger and clearer. For example, instead of "Differences in on-track rates by subgroup classification were observed within all subgroups," try "All subgroups displayed differences in on-track rates." Or instead of "On-track rates were higher for female students," try "Female students had higher on-track rates." An exception is when the action is more important than the actor. Instead of "The study used the Consortium on Chicago School Research method to calculate freshman on-track and off-track rates," try "The Consortium on Chicago School Research method was used to calculate freshman on-track and off-track rates." Passive voice is also useful when the agent is obvious, unimportant, or unknown.

Use parallel sentence structure when making similar points

Parallel construction shows that two or more ideas have the same importance by stating them in the same grammatical form. Instead of "However, Hispanic students attended schools similar to non-Hispanic students in terms of the student-teacher ratio, how large the school was, and whether or not the school had any dropouts," try "However, there were no differences in student–teacher ratio, school size, and presence of dropouts between schools attended by Hispanic students and those attended by non-Hispanic students."

Keep paragraphs to a single point

It's easy for your writing to slip into run-on paragraphs that treat several different points or that break a single point down into too many subpoints. Separating such sprawling paragraphs into several more focused paragraphs helps readers grasp the points more quickly and makes the page less dense visually.

Avoid making authors the subject of the sentence

Focusing on the author instead of the findings can be distracting, making the message harder to see. Instead of "Suárez-Orozco, Gaytán, & Kim (2010) report that Hispanic students make up about 20 percent of all public school students in K–12 schooling nationwide," try "Hispanic students make up about 20 percent of all K–12 public school students nationwide (Suárez-Orozco, Gaytán, & Kim 2010)."

Avoid making tables or figures the subject of the sentence

Bring the point of the table or figure forward in a sentence rather than starting with "table" or "figure." Instead of "As shown in table 1, there is a higher percentage of limited English proficient students than non–limited English proficient students below basic proficiency in math and reading," try "A higher percentage of limited English proficient students than non–limited English proficient students scored below basic proficiency in math and reading (table 1)."

Reviewing the report

Once you have written a complete draft of your report, you should review it to make sure that it says what you want it to say—and that you have said it as effectively as you can. Here are some ways to make this review more efficient and thorough.

Tape the report on the wall

Until you've tried this technique of taping your report on a wall so that you can see it all at a glance, you won't understand what a valuable tool it is. Trust us; you'll be amazed. If you don't have a wall big enough, spread the pages out on the floor or on a large table. Then do the following:

- *Scan the entire report*. Do the sections seem balanced, or are some sections much longer than others? Do the pages look too dense? Can you add more tables or figures to break up the text? Are there too many tables or figures in some sections and not enough in others?
- *Look at the headings.* Mark each level with a different color or code them by level number (1, 2, 3). Do they tell a coherent story? Are they parallel in

construction (all starting with a gerund, or all in sentence style, for example)? Are there at least two headings at each level? Do headings at different levels need intervening text (headings should not be stacked, without any narrative between them)?

- *Now look more closely.* Is there unwanted repetition? Are the same topics discussed in several places, and would the report benefit from consolidating the discussions? Do you need to adjust the balance across sections and subsections? Are the messages/findings presented up front? Would some blocks of text fit better in another location?

Reread the report

Now that you have made any adjustments in your wall review, reread the report imagining that you are an educator or a policymaker looking for answers. Do the messages come across? Do all elements of the report drive the narrative forward? Are there ambiguities? Do you get tired of reading before you've grasped all the messages? Are there annoying digressions? Is there too much detail? Too much technical language?

Review the report against the readability criteria

As a summary check on the clarity of your report, review it again against the readability criteria that are part of the external review of your report draft (table 1). Also, be sure that the report follows the IES conventions summarized in the style section of this guide, in Part II (such as capitalization, headings, tables, and figures; for additional details, see the IES Style Guide at http://nces.ed.gov/statprog/styleguide/pdf/styleguide.pdf).

Table 1. Criteria for assessing the readability and writing quality of REL products

.	Is the document well organized, well written, and free of errors?	The document should be well organized, clear, and carefully written. Authors are also expected to ensure that the document is free of editorial errors.
.	Does the document clearly indicate why the reader should care about the issues and findings covered?	The document should explain the research questions and context in a manner that motivates the intended audience to read and ensures readers understand why the issues addressed are important.
.	Does the document provide engaging examples and details?	The document should clearly describe the nature of the issues being studied and contain details that make the findings meaningful and understandable to readers. For example, this can be done by: • Including compelling vignettes or possible scenarios.

		• Presenting data that describe how the current situation in the region is similar to or different from the one analyzed in the report.
.	Is the document easy to understand, and are its main messages easy for the reader to ascertain?	The document should: • Include a useful summary and introduction. • Contain paragraphs that elaborate on a single point and generally begin with that point. (Short paragraphs are easier to grasp. Start a new paragraph each time the topic changes.) • Avoid using unscientific adjectives to describe quantities, frequencies, extent, or significance (such as *many*, *some*, *a few*, *high*, *low*, *very*). • Include definitions of key terms early in the document. • Use bulleted lists or other nontraditional formats to make information accessible. • Avoid jargon and abbreviations where possible. • Avoid making sources, figures, or tables the subject of a sentence ("Smith found . . .," "Table X shows"); instead put citations and callouts at the end of the sentence in parentheses ("Enrollment declined dramatically between 2002 and 2012 (table X)."). • Minimize use of the first person, focusing on the study or findings instead of on the role or actions of the author.

Worksheet 1. Clarify your purpose and expectations using six basic questions

Question about your report	Tips
1. What is the main topic?	Clearly specifying your topic narrows the boundaries of what your report will cover and keeps it from rambling—or unraveling.
2. What is its objective?	Some pieces of writing have a clear purpose: interpreting study results, evaluating implementation of legislative mandates; some simply describe the conditions they find.
3. Whom do you want to read it?	Identifying your primary audience (state officials, district administrators, teachers, service or technical assistance providers) helps you determine what to write and how to write it. Doing so determines, in part, what sort of language to use—technical or nontechnical, informative or persuasive. It also determines the length and organization of your report.
4. What is the working title?	The title is your first chance to engage your readers, so be brief and communicative. The best titles are memorable and easy to repeat. They may also hint at your findings.
5. How long should it be?	How much time will your audience devote to reading it? If an hour or less, the body of your report should be no more than about 20 single-spaced pages. Few people will read an entire report, no matter how riveting, so keep your messages up front in each section.
6. How long will it take to write?	Estimate how much time you will need to spend on your report from conception to completion, keeping in mind that good planning can reduce writing time. Also keep in mind that other things are sure to intrude on your review and editing time.

Worksheet 2. Articulate your messages

Question about your report	Tips
7. What is your main message?	The most important question about any piece of writing is this: *what is the main message you want to convey?* Or what do you want your readers to walk away with? Answering forces you to boil down into one statement everything you know about your topic and everything you hope to convey by writing about it.
8. What are your supporting messages? • **Supporting message 1** • **Supporting message 2** • **Supporting message 3**	A long piece of writing generally needs supporting messages, but avoid having more than three or four if you want your readers to remember them. Your supporting messages divide your argument and thus become the conceptual architecture that informs your outline. A short piece may have no supporting messages, relying instead on a series of points to support the main message.

Worksheet 3. Decide on a line of argument

Avoid the (deadly dull) standard research formula:

Introduction
Background
Method
Findings
Discussion

Instead try one of the following options…

1. **Explain an issue or question**
    - What issues or questions you addressed
    - What you did to learn more (very briefly)
    - What you found
    - What the findings mean for practice and further research
    - Any important limitations of the study or findings

2. **Divide a subject into parts**
    - Introduce the subject and its parts
    - Part 1
    - Part 2
    - Part 3
    - Conclude

3. **Spell out a sequence**
    - Introduce the sequence
    - Step 1
    - Step 2
    - Step 3
    - Conclude

4. **Arrange disparate details**
    - Introduce the details
    - Group 1
    - Group 2
    - Group 3
    - Conclude

5. **Elaborate on messages**
    - Main message
    - Supporting message 1
    - Supporting message 2
    - Supporting message 3

6. **Solve a problem**
    - Identify the problem
    - Describe its causes
    - Describe its effects
    - Suggest possible solutions

Worksheet 4. Develop a detailed plan

Use your line of argument to develop a content-laden outline and a paragraph-by-paragraph plan. For a 20-page single-spaced study with brief appendixes, try working from the following, using headings and subheadings that tell a story.

Summary of findings or results (8–12 paragraphs)

Why this study? Issues or questions addressed and why knowing more is important (12–16 paragraphs)

What the study examined (3–6 paragraphs in a box, a detailed appendix, and perhaps a few sentences in the main report for context)

What the study found (21–24 paragraphs, divided by research questions [for example, 7–8 paragraphs for each of three questions, with supporting tables and figures])

Implications of the study findings (8–10 paragraphs) on what the findings mean for practice and further research

Limitations of the study (1–2 paragraphs)

Appendixes (for example, details of data and methodology, state-by-state findings)

Part II. Style Guide

These formatting and style guidelines are intended to support visual and usage uniformity across reports, to forge a common institutional identity for them, and to avoid inconsistencies that distract readers from a report's findings.

Report formatting

Apply the Microsoft Word template provided by NCEE, using the embedded styles and formatting for all major elements: cover, imprint page, headings, text, bullets, notes, boxes, tables, figures, references, and table of contents.

Set up Word files to comply with requirements of Section 508 of the Rehabilitation Act, as amended by the Workforce Investment Act of 1998 (see table 2 and attachment B).

Table 2. Section 508 compliance checklist for authors

Requirement	Yes	Not applicable
Have document properties for title, author, subject (description), keywords, and language been supplied?		
Do all URLs contain the correct hyperlink and display the fully qualified URL? (for example, http://www.ed.gov, not www.ed.gov; however, note that there is no "www" in http://eric.ed.gov, http://ies.ed.gov, and http://nces.ed.gov). The way to check this is to look at the address bar in your browser. Is there a www? If not, leave it out.		
Are the headings and subheadings consistent with 508 standards (Have you used the supplied templates in Microsoft Word)?		
Do all images, grouped images, and nontext elements that convey information (figures, equations, photos) have alternative text descriptions?		
Is the document free of pictures of tables or figures and scanned images of text?		
Are multiple associated images on the same page (for example, boxes in an organization chart) grouped as one object?		
Do all data tables have row and column headers?		
Was the table function used to create tables (not tabs or spaces)?		
Do all data tables have a logical reading order from left to right, top to bottom?		
Is each data element in the table in its own cell (no use of hard returns to create a new row or of spaces or tabs to create a new column, no merging of cells)?		
Are data cells in the tables logically associated with the row/column header elements?		

Order of elements in the report

Please follow the NCEE-provided template when preparing report drafts. Most reports should contain the following elements in the following order:

- *Cover.* The cover should include the title, date, and authors and affiliations; generally it should also include the REL logo, the report type icon, and the IES/NCEE logo. The "Key findings" box should summarize the report's main findings in short bullet points or a few sentences in 5–10 lines.
  - *Front matter.* The pages in the front matter should be numbered with Roman numerals. The imprint page is unnumbered.
    - *Imprint page.* This page uses a standard format that includes information required by IES/NCEE on publication purpose, public use, and availability. This page also shows how to cite the report.
    - *Disclosure of potential conflict of interest (if necessary).* This page needs to be included only in reports in which an evaluative statement is made about a product or company (see attachment A).
    - *Acknowledgments (optional).* Contributions by anyone other than the listed authors should be acknowledged, preferably in an unnumbered note; if the list is long, include a brief acknowledgments page. No IES employees should be included in your acknowledgments.
    - *Summary (not to be titled Executive Summary).* A standalone piece conveying the study research questions and key findings and conclusions, in one or two pages.
    - *Contents.* Use *Contents* rather than *Table of Contents* as the heading for the list of the document's contents. Generally, use only two levels of heading on the contents page. Include a list of boxes, a list of figures, a list of maps, and a list of tables.
  - *Main report.*
  - *Appendixes.* These can cover data sources, methodology, literature review, fine-grained technical findings, and the like in greater detail.
  - *Notes.* Use notes sparingly, and keep them short. Use notes only for material relevant and essential to the discussion. Sources should be cited parenthetically in text (author and date) and not in notes. Provide full documentation of bibliographic sources in a reference list. Box notes should be self-contained—not included in the numbering of notes in the main text and appendixes.
  - *References.* The reference list should be the last element in a report. It should always follow any appendixes. All citations in the report should be included in

the references; any sources of study data should also be included. References should not include any items that are not cited in the report. (See references section for details on style.)

In addition, authors should supply these other required pieces:

- *Subject and keywords.* To the extent possible, authors should select a subject that matches the NCEE taxonomy (found on the REL Intranet in the Guidance and Resources > Website Guidance folder) and keywords that map to the terms used in ERIC (found at http://eric.ed.gov/?ti=all).
- *Alternative text* describing figures, maps, and equations (see attachment B).
- *Newsflash* (see attachment C).
- *Underlying data* or editable vector file for figures.
- *Editable vector files for maps*, preferably ai or eps files. These can be produced by many statistical software programs and software that create maps.
- *Abstract* (see attachment D).
- *What's New text and title* (see attachment E).

Style details

This section covers details of style and additional formatting. For further information, see the IES Style Guide at https://nces.ed.gov/statprog/styleguide/pdf/styleguide.pdf.

Abbreviations and acronyms

Avoid abbreviations and acronyms unless a term is used very frequently in the report and the abbreviation is likely to be familiar to most readers. Not all readers will be as familiar with abbreviations as you might think they are. (To reduce how often something is written out without losing your readers in a forest of abbreviations, for some terms you can use the abbreviation as an adjective and the spelled-out form as a noun, as is done with U.S. and United States: "U.S. Department of Education" and "in the United States.") Write out the term with the abbreviation in parentheses the first time the term appears in each major section (summary, main report, each box, and each appendix).

- Spell out states (Massachusetts, not MA), territories (American Samoa, not AS), and commonwealths (Northern Mariana Islands, not NMI), except in reference lists, where two-letter postal abbreviations are used (MA, not Mass.).

- Use District of Columbia, not Washington, DC, in running text (Washington, DC, is acceptable in reference lists).
- Do not use abbreviations in first- or second-level headings or in box, figure, or table titles.

Alphabetization

- Alphabetize any list in text or tables that is not ordered in some other logical sequence (for example, ascending or descending values, steps in a process).
- See references section for rules on alphabetizing reference lists.

Capitalization

Do not capitalize generic titles and names, but do capitalize specific ones. (For instance, "a national assessment," but the "National Assessment of Educational Progress." Or "Secretary of State Hillary Clinton was the third female secretary of state among the last four people holding that office."

Capitalize

- Advanced Placement courses.
- American Indian, Asian, Black, Hispanic, White (when referring to race/ethnicity).
- National School Lunch Program.
- New York State Legislature (but state of New York).
- National Association of Secondary School Principals (but the association).

Do not capitalize

- adequate yearly progress.
- box 1, figure 1, table 1.
- English learner students.
- geometry II (academic subjects).
- grade 5.
- individualized education program.

Callouts

- When citing boxes, figures, tables, maps, and appendixes, refer to them in chronological or alphabetical order. (Do not refer to figure 3 before figure 1 or appendix C before appendix A.) If the order of callouts shifts, reorder the elements. Give maps their own numbers; do not fold them in with figures (map 1, map 2, not figure 1, figure 2).

- Avoid making tables or figures the subject of a sentence. Instead, focus on the findings and place any reference to the table or figure in parentheses. For example, instead of “Table 2 shows that male and female bullying victims did not differ in the prevalence of reporting,” try “The prevalence of reporting did not differ for male and female bullying victims (table 2).”

- On first reference to tables, figures, maps, or boxes, place the element in parentheses (table 1). On subsequent references add the word *see* (see table 1), to indicate that the reader must look back rather than forward for the cited element.

Figures and tables

- Include a numeric or alphanumeric identifier and title for all figures and tables (and boxes). In the body of the text use Arabic numerals (table 1, table 2). In appendixes add the letter of the appendix to the number (for example, in appendix A: table A1, table A2). Tables and figures in boxes are not numbered unless the box contains more than one of an element, in which case they are numbered figure 1, figure 2, and so on.

- Do not place a footnote number on figure or table titles. Instead, use a general note below the figure or table, preceded by the word “Note:” (see sample table below in subsection on tables).

- Table notes should be used to provide general information to aid the reader’s understanding or examples of how to read the table if it is not intuitive to a nontechnical reader. However, every effort should be made to simplify tables to ensure they are easy to read without an additional note.

- Include a source for every figure and table, and place it after the notes, introduced by “Source:”. For figures or tables created by the author(s) but based on data from another source, cite the source as “Author’s [or authors’] analysis based on data from Reynolds (2011).” When the data are from multiple, complex sources discussed in the text or an appendix, cite the source as “Author’s [or Authors’] analysis based on data described in [location].” For figures or tables constructed by the authors and not based on any data, use “Authors’ compilation” or “Authors’ construction” (example 4).

Example 4. Table constructed by authors and not based on data

Table 1. Primary research question, outcome variable, and need for adjustment for multiple tests

Primary research question	Outcome variable	Adjustment required
What is the impact of the program on students' expressive vocabulary?	Expressive Vocabulary Test–2 standard score	No

Source: Authors' compilation.

- Avoid abbreviations unless required because of space constraints. If used, define immediately below a figure or below the last row of a table, before any other notes. Order entries alphabetically and separate each with a period (example: "DIBELS is Dynamic Indicators of Basic Early Literacy Skills. MET is Measures of Effective Teaching.").
- Ensure that figures and tables are editable in Word. Tables should not be pictures pasted into Word. If figures are pasted in as pictures (try to avoid), provide a separate Excel file with the data. Data or vector files are needed for all figures. Authors uncertain of what to provide should seek guidance early to avoid delays later.
- Include enough detail so that the table or figure can be understood as a standalone document, without reading the report. The table or figure should be able to be shared as a graphic on social media, and therefore any needed context should be contained in the notes field.

Figures

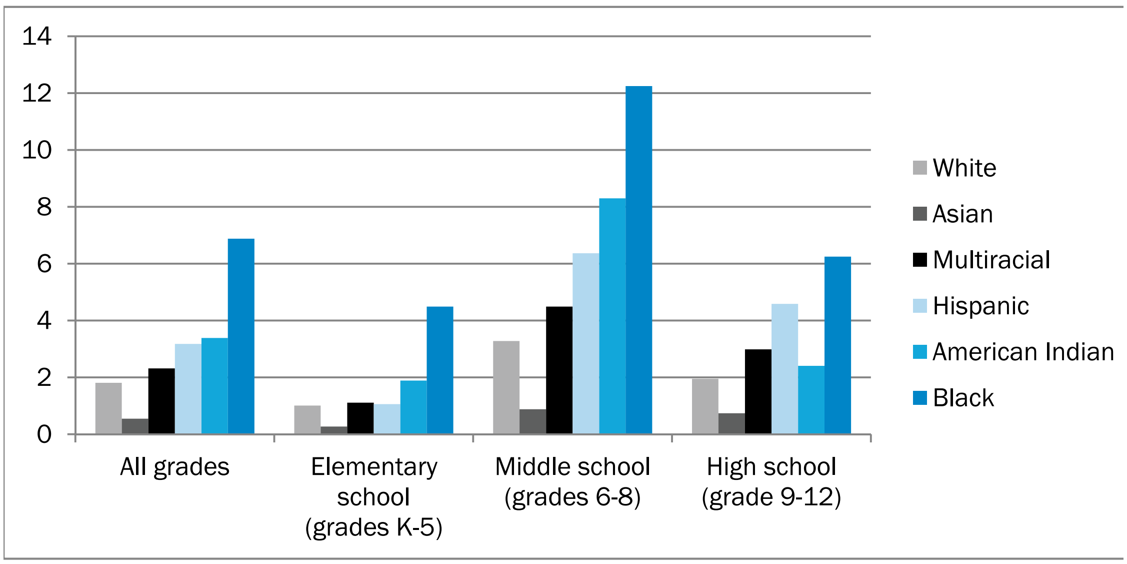
- Use titles that convey the main message that the figure illustrates. If more detail is needed, provide a descriptive caption.
- Label both axes and all bars and lines.
- Figures are intended to give an overall sense of the relationships among the displayed variables. Labeling data points with the precise data values distracts from the main message of the figure, which should be conveyed by the graphic displays of the differences or similarities across groups (difference in height of bars, size of pie slices, distance between lines, slope of lines). Figures or tables with the precise data can be placed in appendixes. If data values are included in figures, round them to whole numbers.
- If the figures do not display the dates for the data along one of the axes, add the date(s) of the data to the figure title.

- Make figures displaying similar information consistent: same x axes across figures, same y axes, same number increments along the axes, and so on.
- Number figures consecutively through the main body of the report (figure 1, figure 2). Number appendix figures with an appendix designator (figure A1, figure A2).
- Use lower case for figure references within text (figure 1).
- Use "see" in figure callouts after the initial reference to a figure (see figure 5).

Here's a sample figure (example 5):

Example 5. Sample figure

Figure 12. Multiple suspension rates were higher for racial/ethnic minority students, except Asian students, than for White students across all grade spans, 2011/12
Percent



Note: The multiple suspension rate is the number of students of each race/ethnicity in each grade span who received multiple suspensions divided by the total number of students of the same race/ethnicity in the same grade span, multiplied by 100.

Source: Authors' analysis of Oregon Department of Education (n.d. b).

Tables

- Set up tables so that each cell contains only one value; create a new row or column for each new cell element. (Do not use hard returns to create a new row or use spaces or tabs to create a new column.)
- Do not include table title or notes and source within the table framework. Set them as text above and below the table frame.
- Identify the period covered by the displayed data in the table title.
- Create headings for all columns, including the first column, referred to as the stub column.
- Capitalize only proper nouns and the first word of the title and of each cell/section.
- Include a unit indicator in the title when all cells are in the same unit—for example: Percentage of students eligible for free and reduced-price lunch. Do not put unit indicators after values in cells (for example, 20%). If a table contains several different units, indicate the unit in parentheses after the table heading or in the stub column, as appropriate. Do not use abbreviations or symbols (#, %).
- Avoid breaking tables across multiple pages. If unavoidable, repeat the column headings on each page.
- Round numbers in a column to the same number of decimal places, generally no more than one. If sets of cells should logically sum to 100 percent or some other numerical total but do not because of rounding, include the note: "Percentages [or "values"] may not sum to 100 percent [or "to total"] because of rounding."
- Use letters, not numbers, for footnotes in tables. Set superscript footnote letters to the right of cell values and centered in empty cells.
- Every cell in a table needs an entry; any blank cells should be explained.

- Use the following symbols, as appropriate, and place the definitions just beneath the last row in the table):
  - na is not applicable.
  - — is not available.
  - Where data have been suppressed to protect confidentiality (when there are fewer than 10 subjects in that cell, for example), use a centered, superscripted footnote letter in an otherwise blank cell. Explain why the data are missing in the footnote.

- .. the value is negligible and is not displayed (used when displaying the value would require the use of more decimal places than for other values in the table (for example, in the series "1.2, 3.4, and 0.003," 0.003 could be replaced with ..).

- Use asterisks to indicate significance levels of values (see example 6 for how to use).
- Lower-center align column heads; lower-left align stub heads.
- Upper-right align numbers in each cell and center the column under the column heading; upper-left align text in table cells.
- Avoid use of vertical lines between table columns.

Example 6. How to denote statistical significance

* for p = .05 or at the 5 percent level
** for p = .01 or at the 1 percent level
*** for p = .001 or at the .1 percent level.
The first line below the table would read:
* Significant at p = .05; ** significant at p = .01; *** significant at p = .001.

- Place table notes in this order (example 7): notes for symbols (such as asterisks for significance levels or na for not applicable), general note (preceded by "Note:"), specific notes (a., b., and so on), and source note (preceded by "Source:"). Use lettered notes (not asterisks) for information specific to certain parts of the table (such as data in one column).

Example 7. Order of table notes

na is not applicable.
Note: Percentages may not sum to 100 because of rounding.
a. Location classifications are based on Texas Education Agency reporting methods (Texas Education Agency 2008e).
b. Based only on the comprehensive high schools in each district.
Source: Authors' analysis based on data from Texas Education Agency (2011a, 2011e).

- Number tables consecutively through the main body of the report (table 1, table 2). Number appendix tables with an appendix designator (table A1, table A2, table B1).
- Use lower case for the word “table” in table callouts (table 1).
- Use “see” in table callouts only after the initial reference; thus, for a table already referenced, use (see table 6).

Here’s a sample table (example 8).

Example 8. Sample table

Table 2. Exclusionary discipline rate and rate ratio, by grade span, gender, race/ethnicity, and special education status

	Exclusionary discipline rate (percent)				Rate ratio[a]			
Student characteristic	All grades	K–5	6–8	9–12	All grades	K–5	6–8	9–12
All students	6.4	3.2	11.1	8.0	b	b	b	b
Gender								
Male	9.0	5.1	15.2	10.6	2.5	4.6	2.2	2.1
Female	3.6	1.1	6.8	5.1	na	na	na	na
Race/ethnicity								
American Indian	9.0	4.0	20.2	8.8	1.8	1.5	2.4	1.4
Asian	2.2	1.1	3.7	2.8	0.4	0.4	0.4	0.5
Black	15.4	9.5	25.4	16.1	3.1	3.5	3.0	2.6
Hispanic	8.5	3.4	15.7	12.2	1.7	1.3	1.9	2.0
Multiracial	6.1	3.4	10.6	7.8	1.2	1.3	1.3	1.3
White	5.0	2.7	8.4	6.1	na	na	na	na
Special education status								
In special education	13.3	8.2	21.1	15.0	2.6	3.6	2.3	2.2
Not in special education	5.1	2.3	9.2	6.8	na	na	na	na

na is not applicable because the characteristic is the reference group.

Note: The exclusionary discipline rate is the number of students with each characteristic in each grade span who received exclusionary discipline divided by the total number of students with the same characteristic in the same grade span, multiplied by 100.

a. Compares the proportion of students in a target group who received exclusionary discipline with the proportion of students in a reference group who received exclusionary discipline. Ratios greater than 1 indicate that students in the target group have a higher exclusionary discipline rate than students in the reference group; ratios less than 1 indicate that students in the target group have a lower rate.

b. No reference group.

Source: Authors’ calculations.

Headings

- Use sentence-style capitalization (capitalize first letter of first word and proper nouns only).
- Have at least two headings at each level.
- Have some text between heading levels 1 and 2.
- Do not hang footnotes on headings. Move them to the end of the first sentence or to another location.

Lists and bullets

- Avoid use of numerals for lists in running text. They make the text look like a draft internal report. For example, change "Prior-year average school achievement was calculated by (1) standardizing the average of the prior-year math and reading scores, (2) totaling the standardized math and reading scores separately for each grade, and (3) standardizing again" to "Prior-year average school achievement was calculated by standardizing the average of the prior-year math and reading scores, totaling the standardized math and reading scores separately for each grade, and standardizing again."
- Use semicolons between elements in a vertical (nondisplayed) list when any one of the elements includes a comma: "Principals received supports and incentives, including a signing bonus; a special contract that included graduated bonuses for meeting two, three, or four of the targets; and consulting visits from an experienced administrator."
- Follow the rules of sentence capitalization and punctuation for bullets, even when they are sentence fragments. Use periods to end each bullet (not semicolons).
- Use numbered lists instead of bulleted lists only when the order refers to directions or a logical account given in the text.

Notes

- To make it easier to check notes against the text, use footnotes until the report has passed through all technical reviews and editing. Convert the notes to endnotes at the layout stage.
- Use notes sparingly; in the main report cite sources in text in parentheses using author-date style (Smith, 2010).
- Consolidate multiple endnotes by defining terms in a glossary or box.

- Place the superscript endnote number at the end of the sentence unless the note applies only to part of the sentence or unless doing so would lead to confusion about what the note applies to.

Numbers

- Use numerals for numbers 10 or greater, and spell out numbers nine or lower unless they are grade levels or units of measure, including distance, percentages, decimals, degrees (of temperature), area, weight, age, and scores (for example, 9 pounds, 8 percent, 7 miles).
- When numerals are used for one or more numbers in a category, use numerals for all numbers of that category in the same group, even those that are less than 10 (for example, 5 of 23 students). The same rule applies to ordinals (8th, 9th, and 10th, not eighth, ninth, and 10th).
- Where there are at least two distinct categories, apply the general rule to each category (three classrooms with 20 students each).
- Do not start a sentence with a numeral (for example, use "Twenty-five students were excluded…" rather than "25 students were excluded…"). If writing out a number is unwieldy or makes it harder to compare the number with others in the sentence or paragraph and the sentence cannot be rewritten, add "Some" or a similar qualifier before the numeral (for example, "Some 57 percent of students achieved…").
- Insert a zero before a decimal for numbers smaller than 1 except for numbers that cannot be greater than 1, such as *p*-values ($p < .05$) and correlation coefficients.
- Numbers smaller than one modify a singular noun (for example, 0.3 standard deviation).
- Elide year number ranges (2001–03, not 2001–2003).
- Use a slash between two years only to indicate an academic year (2004/05). For multiple school years, use an en-dash (2004/05–2005/06).
- Spell out centuries (twentieth century).
- For very large numbers (million or more) use a combination of numerals and spelled out forms (3 million).
- For grades use only cardinal numerals (grade 5, grades 6–10, grade 5 students) not ordinals (5th grade, 6th–10th grades).
- For ages, use "students ages 6–9," "six-year-old students," "students ages 6.5 and older."

- Distinguish percent change and percentage point change. For example, an increase from 40 percent to 54 percent is a 35 percent change and a 14 percentage point change. For percentage points of less than one, percentage point is singular: 0.5 percentage point.

Pagination

- Paginate reports with:
    - Roman numerals for the summary and any other front matter, starting at i for the first page after the imprint page (usually the summary).
    - Arabic numerals for the main report, starting at 1.
    - Arabic numerals for appendixes, with a letter identifying the appendix (A-1, A-2; B-1, B-2; and so on).
    - "Note-" and Arabic numerals for the endnotes (in layout only; Note-1, Note-2, and so on).
    - "Ref-" and Arabic numerals for the references (Ref-1, Ref-2, and so on).
- For pages in landscape orientation, set the page number in the left margin and rotate it 90 degrees to the right (so that all page numbers match when holding the pages in portrait orientation).

Race/ethnicity

- Use IES racial/ethnic categories based on the year of the data (state data may not perfectly correspond with these years).
    - Before 2010: American Indian, Asian, Black, Hispanic, White, More than one race, and Other
    - Since 2010: Hispanic or Non-Hispanic and American Indian/Alaskan Native, Asian, Black, White, Hawaiian Native/Pacific Islander, More than one race/ethnicity or Multiracial, or Nonresident alien.

When appropriate, add the following footnote after the first mention of racial/ethnic categories: "Unless otherwise noted, American Indian includes Alaska Native, Asian includes Native Hawaiian and Other Pacific Islander, Hispanic includes Latino, and Black includes African American."

- Use the phrase "racial/ethnic minority" rather than "races other than White" or "non-White" for racial/ethnic designation.
- Change the racial/ethnic categories in the source material to IES categories if it is clear that the categories refer to the same groups. If the categories refer to

different groups, use the categories in the source material and include a footnote explaining that terms from the original source are being used.

Typography and punctuation

- *Word spacing.* Use a single space after all punctuation.
- *Comma.* To avoid ambiguity, use a comma to separate all items in a list of three or more items, including the last item before “or,” “and,” or “but.” The following sentence reports that four people were surveyed: “The participants surveyed included two administrators, a principal, and a vice principal.” Without the final comma, this could suggest that just two people were surveyed, a principal and a vice principal, both of whom are administrators. Avoid commas after short introductory prepositional phrases (“By 2010 education policies had changed.” “In control classrooms the teachers were required…”).
- *Semicolon.* Use semicolons between elements in a vertical (nondisplayed) list when any one of the elements includes a comma: “Principals received supports and incentives, including a signing bonus; a special contract that included graduated bonuses for meeting two, three, or four of the targets; and consulting visits from an experienced administrator.”
- *Colon.* Capitalize the first word after a colon in titles and headings but not in running text.
- *En-dash.* Use an en-dash (–; created using the control key and the hyphen key on the number pad) to:
    - Replace the word “to” between two numbers or two proper nouns and repeat any symbols used with the numbers ($32–$45 billion, 7–9 percent, K–12, Chicago–New York flight); do not precede such ranges with “from” (wrong: from 7–10 percent) or “between” (wrong: between 7–10).
    - Add a prefix to a compound noun (non–English learner students).
    - Show a ratio: student–teacher ratio.
- *Em-dash.* Use an em-dash (—; created using the control and alt keys and the hyphen key on the number pad) to:
    - Enclose or set off a parenthetical remark (The three studies suggest that seemingly small actions in the classroom—when well timed, well targeted, and systematically implemented—can produce positive results.).

    - Add emphasis (She teaches math to grade 6 students during the day and tutors English learner students after school until 7 p.m.—a nonstop 12-hour day.).

- *Italics.* Italicize titles of books and periodicals and the first use of a word in a foreign language but not subsequent uses and not phrases and abbreviations from another language that have become common in English (a priori, ad hoc) or proper nouns. Do not italicize for emphasis. Convey any desired emphasis through your writing.
- *Hyphenation.* Hyphenate prefixes and suffixes only when:
    - The base word is capitalized (non-Hispanic).
    - The prefix is "self" (self-appointed, self-operating).
    - More than one prefix is used with the same base word: pre- and post-test.
    - The base word and prefix end and begin with the same letter (post-test, re-establish).
    - Closing up could lead to confusion (pre-position, re-creation).
    - Do not hyphenate compound words that include an adverb but are used as an adjective (widely used text, randomly assigned number, well researched report).

References

All original data and material drawn from other sources must be properly cited and listed in the reference list with full bibliographic details. In-text references to data should be followed by author-date citations, not simply by a description of the data source. Citations and bibliographic entries should follow APA style.

In-text citations

- Use author-date citations in the text to refer to sources in the reference list.
- Place a comma between the author or authors' name(s) and the year. (Adams, 2006).
- Provide page or paragraph numbers in text for all quotations (Adams, 2006, p. 149).
- For a work with two authors, cite both names every time the reference occurs in the text, with an ampersand between the names.
- For a work with three to five authors, cite all authors the first time, separating the last author's name from the others with an ampersand; in subsequent citations, include only the surname of the first author followed by et al.

- For a work with six authors or more, cite only the first author followed by et al.
- To distinguish works by the same author(s) in the same year, use letters after the date, and repeat the year for each publication (Achebe, 1987a, 1987b).
- When the principal author and the date are identical for two or more references but some authors differ, cite as many authors as needed to distinguish the references (Wilson, Kendall, Jones, & Evans, 2002; Wilson, Kendall, Jones, & Schaie, 2002).
- In running text use "and" instead of an ampersand to separate the last author Example: Other relevant studies include James and Wagner (2011) and Carter (2012).

Reference list

- Include a complete list of all works cited at the end of the report, following any appendixes.
- To help readers find the sources that you reference and to make sure that ERIC is capturing high-quality education research, include a link to the ERIC permalink for all references that are in the ERIC database.
  - Display ERIC link in the most simplified format: http://eric.ed.gov/?id=ED532792. To edit, simply change the ERIC ID number.
  - Here's an example of how a citation in your reference list (with an ERIC permalink) should read: Laird, J., DeBell, M., & Chapman, C. (2006). *Dropout rates in the United States: 2004.* Washington, DC: U.S. Department of Education, National Center for Education Statistics. http://eric.ed.gov/?id=ED494396
- Use an ampersand to separate the name of the last author from the other authors when there are three or more authors.
- For works with multiple authors, list all authors in the reference list up to six, inverting all authors' names (last name, initials). Use et al. only when the number of authors exceeds six.
- For more than one work by the same author, arrange by date from earliest to latest.
- For more than one work with the same primary author, list in alphabetical order by the second author's last name (or the third author's if the first two are the same).

- If no date is available for a reference item, use (n.d.). List n.d. entries after dated entries for the same author.
- For materials awaiting publication, use “in press” in place of the expected year of publication: “Hoyt, J., & Sorensen, C. (in press)…”. For the in-text citation, use “(Hoyt & Sorensen, in press).”
- In titles of referenced works capitalize the first letter of only the first word in the title, the first word after a colon or question mark, and proper nouns.
- If the author and publisher are the same, use “Author” as the publisher (U.S. Department of Education. (2007). *Mathematics in rural schools*. Washington, DC: Author.).
- In a reference to an edited book, place the editors’ names in the author position and enclose the abbreviation Ed. or Eds. in parentheses after the last editor’s name.
- Add a space between an author’s first and middle initials.
- Add a retrieval date for any reference viewed on the web and supply the URL.

Reference template

Periodical

- Author, A. (Year). Article title. *Title of Periodical, volume no.*(issue no.), page number range. http://eric.ed.gov/?id=E######

Nonperiodical

- Author, A., & Author, B. (Year). *Title*. City, Postal State Abbreviation or Country Name: Publisher. http://eric.ed.gov/?id=E######

Part of a nonperiodical

- Author, A., Author, B., & Author, C. (Year). Title of chapter. In A. Editor, & B. Editor (Eds.), *Title of book* (pp. page nos.). City, State: Publisher. http://eric.ed.gov/?id=E######

Sample references

In-text citations	
One author ***With page reference (for a direct quotation)***	(Anderson, 2010) (Anderson, 2010, p. 89)
Two authors	(Lin & Smith, 2007)

Three to five authors ***First occurrence*** ***Subsequent occurrences***	 (Kane, Taylor, Tyler, & Wooten, 2011) (Kane et al., 2011)
Six or more authors	(Dynarski et al., 2008)
Multiple works	(Raudenbush & Bryk, 2002; McCaffrey et al., 2009)
Same first author/authors and year but different additional authors	(Bridgeland, DiIulio, & Morison, 2007). (Bridgeland, DiIulio, & Streeter, 2007)
Personal communication	(S. Underwood, director of the Idaho statewide system of support, personal communication, April 12, 2012) Personal communications are not included in the reference list but are inserted either in the text if short enough or in an endnote.
Same author and same year	(Vaughn, 2012a, 2012b)
Same author and different year	(Vaughn, 2010, 2011)
Reference entries	
Multiple authors	List all authors in the reference list. Do not use et al. unless there are more than six authors.
Act	No Child Left Behind Act of 2001. (2002). Pub. L. No. 107–110, 115 Stat. 1425.
Book	Bernhardt, V. L. (2004). *Data analysis for continuous school improvement*. Larchmont, NY: Eye on Education. http://eric.ed.gov/?id=ED530118
Chapter in edited publication	Webster, W. J., & Mendro, R. L. (1997). The Dallas value-added accountability system. In J. Millman (Ed.), *Grading teachers, grading schools: Is student achievement a valid evaluation measure?* (pp. 81–99). Thousand Oaks, CA: Corwin Press.
Code	National Education Statistics Act of 1994, 20 U.S.C. § 9001 et seq. (2002).
Common Core of Data	U.S. Department of Education, National Center for Education Statistics. (2010). Common Core of Data. Local Education Agency Universe Survey, 2001–02. Retrieved April 1, 2012, from [URL].
Database	U.S. Department of Education. (2008). Cohort default rate database. Retrieved April 9, 2009, from http://wdcrobcolp01.ed.gov/CFAPPS/COHORT/search_cohort.cfm .
ERIC publication	Laird, J., DeBell, M., & Chapman, C. (2006). *Dropout rates in the United States: 2004*. Washington, DC: U.S. Department of Education, National Center for Education Statistics. http://eric.ed.gov/?id=ED494396

IES publication not available through GPO	Bare, J., & Meeks, A. (1998). *Internet access in public schools* (NCES No. 98-031). Washington, DC: U.S. Department of Education, National Center for Education Statistics. http://eric.ed.gov/?id=ED417698
Journal article	Hoyt, J., & Sorensen, C. (2001). High school preparation, placement testing, and college remediation. *Journal of Developmental Education, 25*(2), 26–34. http://eric.ed.gov/?id=EJ641633
Informal publication	Bettinger, E. P., & Long, B. T. (2007). Addressing the needs of under-prepared students in higher education: Does college remediation work? Harvard University, Cambridge, MA. http://eric.ed.gov/?id=EJ846143
NCES working paper	Ingersoll, R. (1996). *National assessments of teacher quality* (NCES No. 96-24). National Center for Education Statistics Working Paper. Washington, DC: U.S. Department of Education. http://eric.ed.gov/?id=ED415206
Newspaper article	Ravitch, D. (1998, August 10). Lesson plan for teachers. *The Washington Post*, p. A17.
Online document created by private organization	Costa, K. (2012). *Not the ceiling, but the floor: Innovative Harlem early childhood education effort complicated by varying government regulations.* Washington, DC: Center for American Progress. http://eric.ed.gov/?id=ED535620
Paper presented at a meeting	Karmel, T. (2012, April). *VET Research for industry.* Paper presented at the presented at the Annual Conference of the Australian Vocational Education and Training Research Association, Canberra, Australia. http://eric.ed.gov/?id=ED532395
REL report	Barley, Z., & Wegner, S. K. (2007). *Access to supplemental educational services in the Central Region states* (Issues & Answers Report, REL 2007–007). Washington, DC: U.S. Department of Education, Institute of Education Sciences, National Center for Education Evaluation and Regional Assistance, Regional Educational Laboratory Central. http://eric.ed.gov/?id=ED497791
Report (general, working papers, issue briefs)	Wixson, K. K., Fisk, M.C., Dutro, E., & McDaniel, J. (2002). *The alignment of state standards and assessments in elementary reading* (CIERA Report No. 3-024). Ann Arbor, MI: University of Michigan School of Education, Center for the Improvement of Early Reading Achievement. http://eric.ed.gov/?id=ED474625
Report available on the web	New York State Education Department. (2004). *Statistics for public school districts: June 2004 report to the governor and legislature.* Retrieved July 2, 2006, from http://www.emsc.nysed.go/irts/655report/2004/Volume2/RptTable01_2004.pdf.
Website of an organization (not a specific report)	National Association of Secondary School Principals, http://www.nassp.org/about-us, retrieved July 31, 2011. Cite in footnote, without an entry in the reference list.

Report from university	Hoyt, J., & Sorensen, C. (1999). *Promoting academic standards? The link between remedial education in college and student preparation in high school.* Orem, UT: Utah Valley State College, Department of Institutional Research and Management Studies.
Survey	National School Boards Association. (2003). *Four Day School Week Survey*. Retrieved January 3, 2007, from http://www.census.gov/population/www/estimates/aboutmetro.html .
Theses and dissertations **In *Dissertation Abstracts International***	Lin, C. W. (1999). Affective work competencies: Evaluation of work-related attitude change in a job corps residential center. (Doctoral dissertation, Kansas State University, 1999). *Dissertation Abstracts International* 60 (5-A): 1463.
In *ERIC* or *ProQuest*	Pate, M. L. (2009). *Effects of metacognitive instructional strategies in secondary-level career and technical education courses*. (Doctoral dissertation, Iowa State University, 2009). Retrieved from ProQuest Dissertations and Theses. (Publication No. AAT 3397652). http://eric.ed.gov/?id=ED515377
General unpublished thesis or dissertation	Wifley, R. E. (1988). *Effects of high school dropout on under-age mothers*. Unpublished doctoral dissertation, University of Texas, Austin.

Miscellaneous style elements

The preferred terms to use are listed below. If possible and accurate, these terms should be used. However, authors should use their discretion based on their data and the context of their report.

A

adequate yearly progress (not AYP)

after school (adj.)

alternate assessments (only when referring to assessments based on modified academic achievement standards for students with persistent academic disabilities)

alternative assessments (student assessments other than alternate assessments [above] and annual state assessments, such as commercially available assessments like the Stanford Achievement Test and locally developed end-of-course exams)

appendixes (not appendices)

B

box 1 (not Box 1)

C

the College Placement Test (specific) / college placement tests (general)

college-ready (adj.)

cutscores (not cut scores)

D

data (plural); datum (singular)

dataset

decisionmakers, decisionmaking (no hyphen)

E

education (n. & adj., about education or governing education); educational (adj., informative, instructive): The education conference is held once a year. I found the conference to be highly educational.

education sector (not educational sector)

educational attainment (common usage makes this an exception to the rule)

e.g.—change to *such as* or *for example*

elementary school teachers

email

English learner students (not ELs or English learners or ELLs or English language learner students)

English language arts (not English Language Arts)

etc.—change to *and so on*, *and the like*, or *and others*

F

federally funded program (not federally-funded program)

female (adj; avoid using as a noun; use women or girls)

figure 1 (not Figure 1)

follow-up report

free or reduced-price lunch (National School Lunch Program; try "students eligible for free or reduced-price lunch" or "students from low-income households" in place of "low-income students" if not used frequently)

G

gender (refers to the socially constructed roles, behaviors, activities, and attributes associated with men and women; *sex* refers to biological and physiological characteristics of men and women)

grade 2

grades 1–3

grade-level proficiency

H

Hawaii (no okina)

Hawaiian

high-skilled work

high school students (no hyphen)

home language

I J K

i.e.—delete or change to *that is*

individualized education program (IEP), not plan

Institute of Education Sciences (IES)

International Baccalaureate

Internet

Individuals with Disabilities Education Act (IDEA)

Individuals with Disabilities Education Improvement Act of 2004 (IDEIA; this is the name of the reauthorized act)

judgment

K–12

L

large-scale (adj.)

limited English proficient student (not LEP)

local education agency (not LEA)

low-achieving (adj.)

low-income (adj.). Avoid "low-income students"—use "students from low-income households")

M

Mid-Atlantic Region jurisdictions (not states, because includes District of Columbia)

middle school teachers (no hyphen)

Midwest Region (when referring to a REL region)

minority students (specify what kind of minority; generally, racial/ethnic minority students)

more than half (not over half)

multidistrict

multiple-choice questions

N

na is not applicable (see *Tables* subsection on pages 23–26 for other symbols)

noncredit

National Assessment of Educational Progress (may use NAEP once defined if used frequently)

the No Child Left Behind Act of 2001 (first reference) / the act (general); NCLB Act if used frequently in the report (the No Child Left Behind (NCLB) Act of 2001)

non-English-speaking (adj.)

nonprofit

O

online

P

p-value (note italics)

Pacific Region jurisdictions (not states, because includes Guam and others)

percent (not % or per cent; always used with a number or as a column head when the column contains percentages)

percentage (n. or adj., without a number)

percentage point (distinguish clearly from percent)

pilot-tested (adj., hyphenate)

pilot test (verb)

policymakers, policymaking (no hyphen)

postsecondary education

post-test

preK

preschool

pretest

Q R

quasi-experimental design

Race to the Top

randomized controlled trial (n.; RCT, adj. if used frequently)

recordkeeping

REL Regions: Appalachia, Central, Mid-Atlantic, Midwest, Northeast and Islands, Northwest, Pacific, Southeast, Southwest, West; capitalize Region, as in Pacific Region; use Northwest Region states (not Northwest States)

regional educational laboratory (general) / Regional Educational Laboratory Central (specific)

RTI (not RtI) for response to intervention (adj. only; spell out as noun)

S

secretary of education (standing alone); Secretary of Education (with name)

self-imposed (and all other uses of self as a prefix)

sex (refers to biological and physiological characteristics of men and women; *gender* refers to the socially constructed roles, behaviors, activities, and attributes associated with men and women)

short-term prospects (but prospects in the short term)

state Department of Education (only in reference to a specific state department of education, as in New Jersey Department of Education)

state education agency (not SEA)

students in special education (not special education students)

summary (not executive summary)

supplemental educational services (not supplemental education services)

T

table 1 (not Table 1)

table A1 in appendix A (not appendix table A1)

time period

timeframe

tradeoff
timeframe

U V W

under way
undereducated
United States (n.) / U.S. (adj.)
U.S. Department of Education
value-added (n. or adj.)
web
webpage
website
well-being
well developed (not well-developed)
workforce
work readiness program

X Y Z

year 1 (not Year 1)
z-score (note italics)

Numerals

1,000 people per square mile
1 million (not one million)
a third, not one-third (but two-thirds)
1990s (not 1990’s)
ages 15–18 (not aged 15–18)
12-year-old students and 12-year-olds
grade 3 (not 3rd grade)

Attachments

Attachment A
Sample disclosure of potential conflict of interest (to be used in any report in which an evaluative statement is made about a product or company)

None of the authors or other staff involved in the study from [list author affiliations] has financial interests that could be affected by the content of this report.[1] No one on the nine-member Technical Working Group, convened [note frequency here] by the research team to provide advice and guidance, has financial interests that could be affected by the study findings.

[1] Contractors carrying out research and evaluation projects for IES frequently need to obtain expert advice and technical assistance from individuals and entities whose other professional work may not be entirely independent of or separable from the tasks they are carrying out for the IES contractor. Contractors endeavor not to put such individuals or entities in positions in which they could bias the analysis and reporting of results, and their potential conflicts of interest are disclosed.

Attachment B
Sample alternative text for tagging for Section 508 compliance

Alternative text for example report, “Precision gains from publicly available School proficiency measures compared with study-collected test scores in education cluster-randomized trials.”

Page 3

$\sigma_T^2 = \sigma_B^2 + \sigma_W^2$	sigma squared subscript T equals sigma squared subscript B plus sigma squared subscript W
$R_B^2 = 1 - \sigma_{AB}^2 / \sigma_B^2$	R squared subscript B equals 1 minus sigma squared subscript AB divided by sigma squared subscript B
$R_W^2 = 1 - \sigma_{AW}^2 / \sigma_W^2$	R squared subscript W equals 1 minus open parentheses sigma squared subscript AW divided by sigma squared subscript W closed parentheses
(1) $MDE = \left[T^{-1}\left(1-\alpha/2, df\right) + T^{-1}\left(\beta, df\right)\right] * \sqrt{Var(impact)}$	Equation 1 MDE equals open bracket T inverse times open parentheses 1 minus alpha divided by 2 comma df close parentheses plus T inverse open parentheses beta comma df close parentheses close bracket times square root Var open parentheses impact close parentheses

(2) $Var(impact) = \dfrac{\sigma_{AB}^2}{N_{sch} * p * (1-p)} + \dfrac{\sigma_{AW}^2}{N_{sch} * p * (1-p) * N_{stu}}$	Equation 2 Var open parentheses impact close parentheses equals sigma squared subscript AB divided by open bracket N subscript sch times p times open parentheses 1 – p close parentheses close bracket plus sigma squared subscript AW divided by open bracket N subscript sch times p times open parentheses 1 – p close parentheses times N subscript stu close bracket

Page 4

$$(5)\ MDE = \left[T^{-1}\left(1-\alpha/2, df\right) + T^{-1}\left(\beta, df\right)\right] * \sigma_T \sqrt{\frac{\rho(1-R_B^2)}{N_{sch} * p * (1-p)} + \frac{(1-\rho)(1-R_W^2)}{N_{sch} * p * (1-p) * N_{stu}}}$$

Equation 5 MDE equals open bracket T inverse open parentheses 1 minus alpha divided by 2 comma df close parentheses plus T inverse open parentheses beta comma df close parentheses close bracket times sigma subscript T times open square root rho times open parentheses 1 minus R squared subscript B close parentheses divided by open bracket N subscript sch times p times open parentheses 1 minus p close parentheses close bracket plus open parentheses 1 minus rho close parentheses times open parentheses 1 minus R squared subscript W close parentheses divided by open bracket N subscript sch times p times open parentheses 1 minus p close parentheses times N subscript stu close bracket close square root

Page 19

Figure 3.1 More than 80 percent of leadership team members attended six professional development sessions, by consortium, 2009

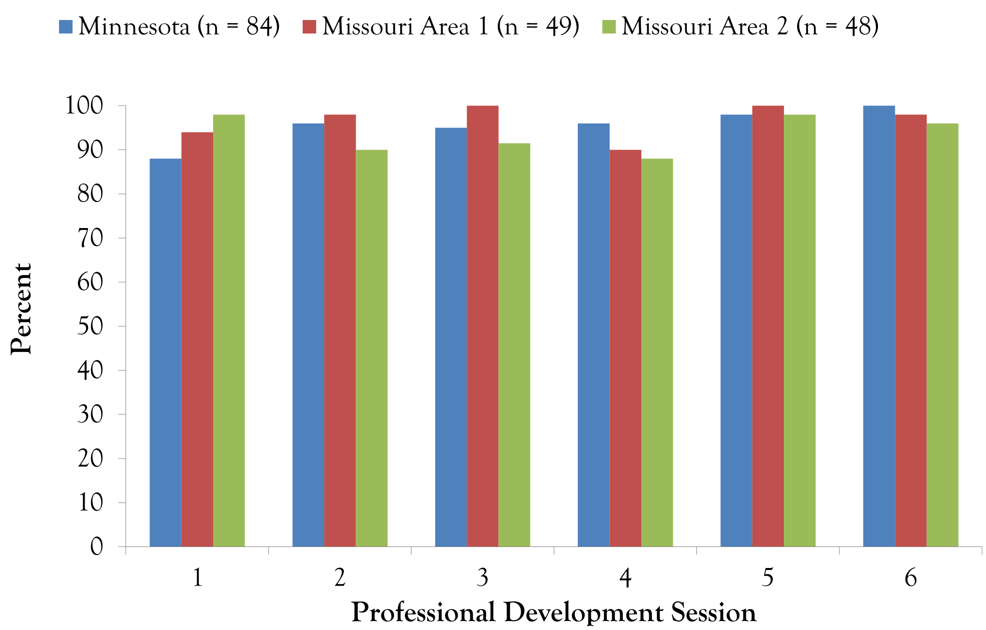


Figure 3.1: More than 80 percent of leadership team members attended six professional development sessions, by consortium, 2009, is a vertical clustered bar graph. The vertical axis is labeled "Percent," with a minimum value of 0% and a maximum value of 100%. The horizontal axis is labeled "Professional development session." There are six professional development sessions, each labeled by a number, one through six. For each professional development session there are three vertical bars. From left to right within each session the bars are Minnesota (n = 84), Missouri Area 1 (n = 49), and Missouri Area 2 (n = 48). The bar labels and values are as follows: Professional development session 1: Minnesota, 88%, Missouri Area 1, 94%, Missouri Area 2, 98%; Professional development session 2: Minnesota, 96%, Missouri Area 1, 98%, Missouri Area 2, 90%; Professional development session 3: Minnesota, 95%, Missouri Area 1, 100%, Missouri Area 2, 92%; Professional development session 4: Minnesota, 96%, Missouri Area 1, 90%, Missouri Area 2, 88%; Professional development session 5: Minnesota, 98%, Missouri Area 1, 100%, Missouri Area 2, 98%; Professional development session 6: Minnesota, 100%, Missouri Area 1, 98%, Missouri Area 2, 96%.

Attachment C
Sample Newsflash

Newsflashes should be written in clear, plain language and follow the guidance distributed in September 2013 (found on the REL Intranet in the Guidance and Resources > Website Guidance folder).

For example:

Will Raising the Compulsory School Attendance Age Improve Student Outcomes?

States have raised the compulsory school attendance age to 17 or 18, anticipating that a reduction in dropout, truancy, and discipline problems will compensate for the costs of educating students longer.

But is there evidence of a positive effect on student outcomes of this policy change?

A review by REL Mid-Atlantic at ICF finds that there is insufficient evidence to build a case for or against the policy change. REL Mid-Atlantic examined the research on outcomes in 11 states that raised the compulsory school age during 2002–2011. Recent studies tend to conclude that states that enact stricter compulsory attendance age laws should do so in conjunction with complementary retention and dropout prevention policies that create a comprehensive approach.

The report includes a suggested plan for data collection and analysis that could provide evidence for policymakers considering an increase in the compulsory school attendance age.

This review was conducted at the request of a state in the Mid-Atlantic region that was considering raising its compulsory schooling age. Regional Educational Laboratories conduct research on pressing education issues identified by their regions and share the findings widely so that other regions may benefit from their work. To learn more about REL work, follow NCEE on Twitter at @IES_NCEE.

Attachment D
ERIC guidance on writing abstracts

This is guidance that ERIC provides authors for writing abstracts. Authors are encouraged to follow this guidance.

Material submitted to ERIC must include an abstract written in English. Clarity, brevity, and accuracy are the key to writing an abstract of maximum value to ERIC users.

Writing style

- Use specific words, phrases, concepts, and keywords from your paper.
- Use precise, clear, descriptive language.
- Write from an objective, rather than evaluative point of view.
- Define unique terms and acronyms the first time used.
- Write one paragraph, from 150 to 500 words in length.
- Use complete sentences.
- Write in the third person; do not use "I" or "we."
- Use verbs in the active voice.

Narrative abstract guidelines and sample

Narrative abstract elements
A narrative abstract is a summarization or synopsis of the full report, written in one paragraph, which should include five elements:

- ***Purpose:*** presenting the objectives and hypotheses of the research or intervention.
- ***Methodology:*** providing the sample size, geographic location, ethnic/racial factors, variables, controls, conditions, tests, description of research design, details of sampling techniques, data gathering procedures.
- ***Results:*** describing the experimental or theoretical results obtained, data collected, causal relationships and correlations noted, and effects observed.
- ***Conclusions:*** recording the outcomes and findings and their relationship to the purpose of the research.
- ***Recommendations:*** stating the implications for policy or practice, applications, and suggestions for follow-up, future studies, or further analysis.
- ***Additional data:*** enclosed in parentheses, noting the existence and number of references, tables, graphs, exhibits, test instruments, appendixes, or other supplemental materials in your paper.

Sample narrative abstract showing how each element adds to the abstract
(Purpose) The purpose of this study was to examine the short-term effects of a two-way bilingual education program on the literacy development of students in kindergarten and first grade. **(Methodology)** Two groups of children were compared in terms of their academic achievement in English language arts. The groups included students with limited English proficiency as well as students who were not limited

English proficient. One group was instructed in English approximately 70% of the time and in Spanish approximately 30% of the time in a two-way bilingual education (extended foreign language) program. The academic performance of these students was compared with that of a group of students who attended the same school but were enrolled in a regular program. Participants were 46 treatment group students in kindergarten, compared with 41 other kindergarten students, and 57 first graders, compared with 71 other first graders. **(Results)** Results indicate that after one year of the intervention, there were statistically significant differences between the two groups only in sight vocabulary (at kindergarten and grade 1) and in alphabet (kindergarten). In all other areas of language development, there were no statistically significant differences between the achievement scores of the two groups. **(Conclusions)** Results show that students in the extended foreign language program make adequate academic progress, confirming the usefulness of the two-way bilingual program in reducing the achievement gap between limited English proficient students and others. **(Recommendations)** Educators need to increase their knowledge of the effects of instructional programs on the language acquisition of limited English proficient students in order to improve the students' academic development. **(Additional data)** (Contains 3 tables)

Note: The recommended narrative abstract element labels, shown in **bold** in the sample above, do not appear in the published abstract.

Attachment E
Sample "What's New" title and content

The "What's New" title should be between 10-20 words and should announce the topic of the report in an engaging headline. The "What's New" content should be no more than 30 words and briefly explain the content of the report in plain language.

For example:

Transfer incentives for high-performing teachers: Final results from a multisite randomized experiment
NCEE has released a new report on the effectiveness of incentives to high-performing teachers for transferring to one of their district's lowest-achieving schools.

ERIC releases 62,900 full text documents and is indexing new content weekly
During October and November, ERIC restored more than 62,800 full-text PDFs in the online collection and is able to return approximately 7,000 full-text documents per week to the c ollection.

Are you getting the most from your school climate data? An interactive webinar from REL Midwest
Join REL Midwest and educators across the country for an interactive webinar on using school climate data to improve student outcomes.

REL Southeast uses growth models to predict scores on end-of-year assessments
REL Southeast at Florida State University evaluated student growth in reading comprehension over the school year and compared the growth to the end-of-year Florida Comprehensive Assessment Test (FCAT).

REL Midwest report compares the value-added scores from state assessments and norm-referenced assessments
REL Midwest examined the degree to which teachers' value-added estimates differ based on the assessments used to measure their students' achievement growth.