

W.E. Upjohn Institute for Employment Research

STYLE GUIDE for Working Papers and Reports

Updated July 2016



Overview/Contents

OVERVIEW

The Upjohn Institute is an author-friendly publisher. The author's preferences are primary, and exceptions within reason to house style and formatting will be accommodated. The working paper series is only lightly edited to conform to style, format, and to maintain consistency throughout. Editing that requires back and forth between author and editor will be avoided.

Working papers are not typeset in the same manner as manuscripts and are distributed via the Institute's web site only. The author and his/her administrative assistant prepare and finalize the paper, present it to the director of publications for approval and light editing, and submit the final version to the Institute webmaster for uploading to the Institute's web site.

Technical reports are prepared according to the author's preference and are usually the result of a funded project. Formatting often follows the funding agency's formatting guidelines; however, basic guidelines found in the Institute's Manual of Style (section on chapter text, pp. 15–19) may serve as a starting point. The author and his/her administrative assistant prepare the report, present it to the director of publications for approval and submit the final version to the Institute repository for posting. Technical reports may be edited if the Author desires; however, they are often edited prior to submission to the funding organization or agency. Technical reports are numbered sequentially; the next available number is assigned by the author's administrative assistant.

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Submission/Basic Requirements

Submitting to Bepress (Institute Repository)

The following are guidelines specific to working papers. For more detailed style and formatting guidelines, see *The Upjohn Institute Manual of Style* or the *Chicago Manual of Style*.

Following a review of the paper, the director of publications will either forward the paper to the manager of publications who will assign an editor, or the paper will be returned to the author for corrections. If the former, the paper receives a light edit and is then returned to the author with queries and, possibly, formatting instructions. The author returns the paper to the editor who verifies that the queries were properly responded to and the formatting issues addressed.

Once satisfied with the paper, the editor forwards it to the author's administrative assistant who then assigns a working paper number, prepares a title page, verifies that the format follows guidelines, prepares a PDF of the paper, fills out the repository submission form, and sends the paper to the director of publications.

Upon approval, the administrative assistant submits the PDF of the paper and submission form to the Institute Repository for posting. The Information Center then notifies the manager of publications and the communications specialist that the paper is posted to the repository.

Basic Requirements

Word Processing

- Select and use consistently throughout the manuscript any standard serif or non-serif font in point sizes 10 to 12. The same font should be used for all text, headings, page numbers, table titles, and figure captions. A smaller typeface may be used in footnotes and elsewhere if appropriate; however, the size must be at least 10 points. The preferred font face and size for all Institute documents is Times New Roman 12 point.

Pagination

- **Introductory Material:** the title page (including Abstract and Acknowledgments), table of contents, list of tables, and list of figures appear in this order and are considered the introductory material. Page numbers in the introductory pages are expressed in lower case Roman numerals (i.e., i, ii, iii). The first page counted is the title page, but a page number does not appear on that page. The first page of the document that bears a page number is page ii, which is usually the first page of the table of contents (unless the Abstract and/or Acknowledgments runs longer than one page).
- **Body of the Manuscript:** the main text, appendices, and references are considered the body of the manuscript. Each of these pages is assigned a page number that is expressed in Arabic numerals (i.e., 1, 2, 3). Begin the pagination at 1 and continue consecutively to the end of the manuscript, including

Headings/Spacing

the appendices and references.

Margins and Placement of Page Numbers

- Margins on the manuscript must be at least 1 inch on all four sides. Page number placement is usually centered, 1 inch from the bottom of the page but may be located elsewhere at the Author's discretion.

Headings

- The appearance of the levels of headings used should follow the Institute's Manual of Style and should be consistent throughout the entire manuscript.
- Heading levels: (Note: paper title is not a Level 1 heading)
 - First-level head: All caps, bold, flush left, 30 pts above, 24 pts below
 - Second-level subhead: Title Caps, bold, flush left, 12 pts above and below
 - Third-level subhead: Indented 0.5 inches, bold, initial cap, 12 pts above, 6 pts below
 - Fourth-level subhead: Indented 0.5 inches, bold, initial cap, 12 pts above, ends in period, run-in to body text
- Examples of heading styles:

ECONOMICS OF LABOR MARKETS (Level 1)

Expected Outcomes (Level 2)

Short-term outcomes in electronics (Level 3)

Market distinctions. Paragraph text runs in... (Level 4)

Vertical Spacing Summary

- **Single spacing.** Generally, single spacing is used within headings, table titles, or figure captions that run more than one line; within reference lists, footnotes and endnotes, and in quoted material if set off and indented within the body of the text ("blocked" quotations). [Normally, quotations longer than 40 words—or 4 lines—are "blocked." If set off, do not use quotation marks unless found in the quotation itself. All material directly quoted must include an exact page reference.]
- **Double spacing** (one blank line) is used within the body of the manuscript and between single-spaced material and adjacent material, unless the single-spaced material is a heading.

Lists

Seriation (Lists in Text)

- General guidelines follow; however, the Institute's Manual of Style should be followed. Pay special attention to making sure that the lettering/numbering and indentation of lists in text is consistent.
- **Numbered Lists:** Lists can flow in-text or be set apart from text on separate lines.
 - If the items to be listed are at least one sentence in length, such as conclusions, procedures, null hypotheses, and successive steps, use separate paragraphs enumerated in Arabic numerals with only the right closing parenthesis (i.e., 1), 2), 3), etc.) regardless of whether or not the number of items is specified. Separate numbered paragraphs can be further seriated with a), b), c) or bulleted lists may also be used.
 - For listing, within a paragraph, a series of items that are not complete sentences (e.g., factors, points, levels, and steps) use Arabic numbers enclosed in closing parenthesis (i.e., 1), 2), 3), etc.). Separate items with a comma, unless any item contains an interior comma, then separate items by a semicolon.
- **Bullet List:** Bullet lists include all material that is not part of an enumerated series. The bullet character is placed at 0.5 inch from left margin; text is indented 0.75 inch from left margin (0.25 inch from bullet character), 4 pts above and below each entry. Carry-over text aligns with the first letter of the list, not the bullet character.

Title Page

Title Page Format

- **Title and Subtitle:** [14 pt, bold, centered, approximately 2 inches down from top of page, 1 inch below the Institute banner]. If the title is more than one line in length, the second and third lines should be single-spaced with the longest line being the first line (e.g., an inverted pyramid shape). Arrange the lines logically (e.g., break after a colon or before a clause.)
- **Working Paper (WP) Number:** [12 pt, bold, centered, 2 lines (double space) below title]. Working papers are numbered sequentially. The first two digits of the number indicate the calendar year (i.e., 2009 = 09; 2010 = 10; etc.) The next available number is assigned by the administrative assistant preparing the paper and is obtained from the Excel spreadsheet located at J:/pub/SWP/number list. Papers prepared by outside authors will be assigned a working paper number by the director of publications' administrative assistant.
- **Author(s):** [centered, 2 lines below (double space) working paper number]. List each author on separate line, with affiliation (*italicized*) and contact information (e-mail or phone) with one blank line space between each author.
- **Date:** [centered, 2 lines (double space) below last author]. List date originally written and dates of any revisions.
- **Abstract:** Heading [bold, centered, ALL CAPS, 3 lines (triple space) below date]. Text begins on second line below heading and is limited to 250 words, single spaced.
- **JEL Classification Codes:** [flush left, 2 lines below Abstract]. JEL Classification codes are required by the Institute webmaster and assigned by the Author. Separate with commas.
- **Key Words:** [flush left, 2 lines below JEL Codes]. Keywords are required by the Institute webmaster and assigned by the Author. Separate with commas.
- **Acknowledgments:** [bold, flush left, 2 lines below Key Words]. Text begins on second line below heading; each paragraph is indented 0.5 inch and single-spaced.
- **Disclaimer:** "Upjohn Institute working papers are meant to stimulate discussion and criticism among the policy research community. Content and opinions are the sole responsibility of the authors."
- Spacing between entries can be modified to fit the page should the information be too long to fit the indicated spacing.
- The first page counted is the title page, but a page number does not appear on this page. The first page of the document that bears a page number is page ii, which is usually the first page of the table of contents (unless the Abstract and/or Acknowledgments runs longer than one page).

Title Page Example

W.E. UPJOHN INSTITUTE
FOR EMPLOYMENT RESEARCH

Researching the causes and consequences of unemployment

Economic Development Benefits of Preschool Expansion in Kalamazoo County

Upjohn Institute Working Paper 09-147

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W.E. Upjohn Institute for Employment Research

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July 24, 2008

ABSTRACT

This paper examines...

JEL Classification Codes: R58, I21, J24

Key Words: Preschool, economic development...

Acknowledgments: We would like to thank...

Disclaimer: Upjohn Institute working papers are meant to stimulate discussion and criticism among the policy research community. Content and opinions are the sole responsibility of the authors.

Body Text

PAGINATION

- Page number is centered, bottom of page, expressed in Arabic numerals; count begins on first page of full text.
- Page numbers in the introductory pages are expressed in lower case Roman numerals (i.e., i, ii, iii).

BODY TEXT

- Repeat title at top of first text page
- **Text:** Double-spaced, 0.5 inch paragraph indent; one space after period.
- **Bulleted Lists:** bullet character indented 0.5 inch; text starts at 0.75 inch from margin (0.25 inch from bullet character) and is single spaced. Vertical spacing 4 pts above and below each entry. Carry-over text aligns with first letter of list, not bullet character. Bulleted lists include all material that is not part of an enumerated series.
- **Numbered Lists:** Arabic numbers with closing parenthesis only (i.e., 1), 2), 3)); indented 0.5 inch; text begins at 0.75 inch from margin (0.25 inch from closing parenthesis); carryover text aligns with first letter of list, not numeral. Numbered lists are used when the text specifically mentions an enumerated series, as in, “There were seven choices” or “Three points to be made are ...” or if listed items are at least one full sentence in length.
- For listing within a paragraph, a series of items that are not complete sentences (e.g., factors, points, levels, and steps) sometimes use lower case letters—i.e., a), b), c). However, Institute guidelines prefer the use of numbers. If the number of items listed is specified numerically (e.g., “the following three items ...”) then use the Arabic numerals 1), 2), 3) within only the right closing parenthesis. Entries are separated with a comma unless any item contains an interior comma, then separate items with a semicolon.
- If items to be listed are at least one full sentence in length, such as conclusions, procedures, null hypotheses, and successive steps, use separate paragraphs enumerated in Arabic numerals, regardless of whether or not the number of items is specified. Separate numbered paragraphs can be further seriated with a), b), c) or bullets may also be used.
- Lists should follow sentence-style punctuation. Precede the list with a colon, and separate elements in the list with a semi-colon. If list entries are complete sentences, punctuate accordingly.

EXAMPLES

The following three points are worth mentioning:

- 1) For many early retirees, we expect a period of bridge employment between career employment and full retirement.
- 2) For those who return to work, they will likely return to nonstandard employment.
- 3) We expect the decision to be related to health status.

Body Text

Dr. Mayfield developed five indicators of conditions that were considered sufficiently severe or chronic to warrant: 1) substantial medical expense; 2) the need for additional monitoring; 3) the need for immediate hospitalization; 4) the need for continued surveillance of the patient in an outpatient setting; or 5) the need for child welfare intervention.

- **Block Quotation:** fully justified, 0.5 inch indent left and right, single-spaced, 4 pts above and below quote. Use block quotes when quotation is more than 10 lines. Do not enclose block quote in quotation marks. All material directly quoted must include a reference citation including an exact page reference.
- **Equation:** Equation numeral encased in full parentheses, placed at left margin; 0.25 inch tab space between numeral and equation. In text, spell out and capitalize “Equation”: Based on Equation (1), the results indicate ...
- Table and figures are also capitalized in text and on tables/figures: Table 1, 2, etc. Figure 1, 2, etc.

Miscellaneous Usage Guidelines

Examples of en-dash use with compound words:

- the post–World War II years
- the hospital–nursing home connection
- the University of Wisconsin–Madison

Capitalize nationalities, e.g., African American, Latino.

Do not capitalize “white” or “black” when referring to people of a certain race.

Ordinals are always spelled out in the text even if they are expressed numerically in the title; e.g., use “twenty-first century” in text even if it is “21st Century” in the title.

- Set spans of years as, for example 1990–1991 (not 1990–91).
- Digital mentions: use “online,” not “on-line.” Use “website,” not “Web site.” Internet is capitalized.
- Age reference: set as, for example, “For youths aged 14–19.” Do not use “ages 14–19 or “age 14–19.”

Footnotes & Endnotes

Follow author's preference for footnotes vs. endnotes; however, footnotes are preferred.

FOOTNOTES

- In-text numerals: Wherever possible, a note number should fall at the end of the sentence. [10 pt, superscript, outside punctuation.]
- Footnotes placed at bottom of same page as footnote reference.
- Rule: Footnotes on a page are preceded by a rule placed above the first note.
- Footnote Text [10 pt, single spaced, paragraph style, indented 0.5 inch]
- Citations within notes should refer reader to the reference list. Use author/date system, as in text in general.

ENDNOTES

- In-text reference numeral should fall at the end of the sentence whenever possible. [10 pt, superscript, outside punctuation.]
- Place endnotes at end of working paper, following appendix (or text if no appendix), and preceding references.
- Begin notes on same page as text, unless space is tight (should be able to fit at least 6 lines of text on the page).
- Heading “**Notes**” [bold, centered] 1 inch from top of page, if starting on new page
- Text [10 pt, single spaced. Note numerals flush left, period follows numeral, one space following period]. Paragraph style; 4 pts below each endnote.
- Citations within notes should refer reader to the reference list. Use author/date system, as in text in general.

Tables & Figures

The following are general guidelines specific to tables; for more specific formatting guidelines see The Upjohn Institute Manual of Style.

- No table or figure is included if it is not referred to in the text. Additional tables and figures may be placed in the appendices; such tables and figures need not be identified on the List of Tables or List of Figures and do not need to be referenced in the text.
- Tables and figures may be embedded within the text of the paper or placed at the end of the working paper pursuant to the author's preference. If placed at the end of the paper they should follow references.
- If embedded in text, the table or figure should be placed as directly as possible after its first reference, but should not be split across pages if it can fit on one page in its entirety. The table or figure does not need to immediately follow; the narrative may continue even if reference to another table or figure is made. The table or figure may be placed at the top of the following page. Table and figure placement should be consistent throughout the text.
- It is preferable to number tables and figures sequentially in Arabic numerals, beginning with 1. However sub-numbering may also be used (e.g., Table 4a, Figure 1.2) according to the author's preferred style. Table titles and Figure captions should be kept brief; multiple sentences should not be used. Additional descriptive material can be placed, if necessary, in a note below the table or figure.
- If tables spread over more than one page, shorten title on second and subsequent pages to "Table X (continued)" only and add "continued" [lower case] in parentheses following abbreviated table title [no punctuation]. Example: Table 6 (continued).

TABLE STYLE & FORMATTING

- Three-rule format is default table style; spacing and format of all tables should remain consistent throughout the entire document.
- Table number and title [10 pt, flush left, bold, Initial caps/title casing; carry over lines align with first word of title]; two spaces between table number and title.
- For values that have a superscript and an asterisk, the superscript comes first.
- Table NOTE is not used if the only items listed are superscript items; statistical significance statement and explanatory notes are the first entries after the table. Paragraph spacing is used.
- If two or more levels of headings are needed, use decked heads. In a decked head, the first heading, which applies to at least two columns, is called the spanner head. A horizontal rule underneath the spanner head indicates the columns to which the heading applies. Insert a small vertical space between multiple spanner heads.

Tables & Figures

EXAMPLE:

Table 2.1 Demographics of Workers Hired, by Age and Ethnicity, 1999^a

Stub head ^b	Spanner head		Spanner head	
	19–24	25–32	White	Latino ^c
Row heading 1	35*	15	21 ^{d*}	22
Row heading 2	55**	12	20	25***

NOTE: * significant at the 0.10 level (two-tailed test); ** significant at the 0.05 level (two-tailed test); *** significant at the 0.01 level (two-tailed test).

^a

^b

^c

^d

SOURCE: Placement of source note.

- Column headings: [10 pt, centered, sentence-style caps except stub head is flush left] Use symbol for percent (%) in column heads.
- Row heads: [10 pt, flush left; carryover lines indented 0.15 inch] Subheads are indented 0.15 inch with carryover line(s) indented 0.25 inch.
- Table body: [10 pt, (9 pt okay if necessary)]
- Note and source: [9 pt, colon + 1 space; paragraph style]
 - “NOTE” or “SOURCE”: [9 pt, Times New Roman, all caps]
 - Order: NOTE (significance statement, explanatory notes listed first), superscripts; source.
 - General significance statement: * significant at the 0.10 level (two-tailed test); ** significant at the 0.05 level (two-tailed test); *** significant at the 0.01 level (two-tailed test).
 - Use superscript letters (no numbers or asterisks). Order within table is across, then down.
 - There should be a SOURCE for all tables containing data (not necessary for text only tables) unless the table is based on the author(s) own calculations. However, the editor has the discretion to include author(s)’ calculations as a source if it is deemed to be helpful.
- If all data in the table are the same units, designate unit in parentheses following table title. If all data in a column are the same unit, designate unit in column head; if all data in a row are the same unit, designate unit in row head.
- Empty cells: Leave blank in regression analyses and where consecutive blocks of cells are empty. If only one or two cells are blank in the entire table, use I/M (em dash). (RULE OF THUMB: if leaving a cell blank could be construed as an error on the copyeditor’s part, insert an em dash.) Usage: I/M (em dash) = data not available; n/a = not available—may be used in some cases but the default should be an em dash; blank = not applicable. The use of these should then be defined in table NOTES.

Tables & Figures

- Align numerical data on decimal if all data in the column are the same unit. Columns of data in which the units are mixed should be centered to not imply that the numbers are comparable.
- Do not spell out or abbreviate percent in tables; use %
- Abbreviate second set of numerals in inclusive numbers: 1976–78.
- For text only tables, the stub head is set flush left and column heads are centered. All text is set flush left.

EXAMPLE:

Stub head		Text only
Michigan State University	text	text
“Sparty” is their mascot	text	text

- Use commas in numerals as thousands separator (e.g., 123,456,789).
- Use a zero to the left of a decimal in all numerals less than zero (e.g., 0.34).
- Where possible, limit to two decimal places to the right of the decimal (e.g., 0.46, not 0.4569). BUT: Author preference should be followed consistently for all data in table body.
- In table values, asterisks are used to indicate statistical significance. In table note the significance statements should be run together on same line to save space, separated by semi-colons.

FIGURE STYLE & FORMATTING

- In text, capitalize Figure (See Figure 1, or Figure 1.1 shows ...)
- Figure number and title: [10 pt, flush left, bold, Initial caps/title casing; carry over lines, hanging indent to align with first word of title; two spaces between table number and title] Figure titles should relay the figure’s “story” in a descriptive way. An explanatory caption following the title is permissible but not encouraged.
- Figures and graphs should be designed to emphasize the “story” being told. Design should draw attention to the data by limiting background busyness and other superfluous design elements that draw attention to the data.
- Limit use of grids, borders, busy line patterns, or other unnecessary graphical elements. If a grid is used, use thin lines in gray or light colors. Keep plotting symbols (square, circle, or diamond on the graph line) simple and small. Use solid symbols (square versus “x”) to aid in visibility when graphs are reduced to fit the page.
- Limit border to X and Y axis only; do not box the graph unless there are two vertical axes.
- If possible, use arrows and text (data labels) to identify data rather than legends. Legend placement should be inside the figure in a blank area. If possible, place legend to the right or above the figure body.

Figures/Appendix/References

- Avoid too many conflicting patterns in bar graphs. First preference is black/white/gray. Light gray and dark gray may be used for a total of three shades of black plus white.
- Use same font for entire graph.
- Y axis should always be identified; X axis should be identified only for clarity (e.g., years do not need a label “year”).
- Notes and source information should be set in 9 pt, flush left, placed at the bottom of the graph.

Appendix

- In text, refer to appendices as Appendix A, Appendix B, etc. [capitalized]
- Appendices follow last page of text and begin on new page.
- Title: [Times New Roman, 12 pt, bold, centered approximately 1 inch from top of page].
 - All-text appendix: label Appendix A, Appendix B, C, ... etc. Title (if provided) begins two lines down (double-space) from “Appendix A.”
 - Appendix tables, label Table AI, BI, etc. (e.g., Appendix Table BI. Determinants of Paying for Primary Child Care).
- If only one Appendix to paper, simply refer to it as the Appendix.

References

References should be edited to conform to Institute style, unless the author objects. Some authors may be submitting the working paper to a journal or publisher with a different style. In such cases, simply ensure that whatever style is chosen is applied consistently throughout the reference list. Regardless of style used, ensure that all the citations noted in the text are listed in the reference list.

In working papers, reference lists are placed at the end of the manuscript, following any appendices and after Notes (if endnotes are used).

For more detailed style and formatting guidelines, see The Upjohn Institute Manual of Style or the Chicago Manual of Style.

FORMATTING

- Reference list follows Notes, on the same page if three references and the heading will fit. If following an appendix, begin Reference list on new page.
- Heading [“References” — Times New Roman, 12 pt, bold, centered].
- Body [Times New Roman, 12 pt, 0.5 inch hanging indent].

References

STYLE

In text

- List author's last name and date within parentheses and no punctuation (Smith 1999).
- When more than one entry is included, order entries alphabetically and separate with semi-colon. (Adams 2000; Medill 1997; Smith 1999).
- Additional works by the same author are listed as (Smith 1999, 2000).
- Use "et al." (period follows al. only) with three or more authors.
- Use "a," "b," "c," etc. to distinguish two entries by the same author in the same year (Smith 1999a). If referring to both entries "a" and "b" in the cite, list as: (Smith 1999a,b).
- If referring to a specific page in the text, or if quoting, include page number following year, with "p." for page (Smith 1999, p. 125).

In Reference List

- Reference list must include only those citations noted in text.
- List all authors in reference list; do not use et al.
- Order alphabetically by last name.
- Multiple entries by same author(s): order in reverse chronological order (earliest publication first); Second and subsequent entries by the same author(s) are indicated with three em dashes (———).
- Single-author entries come before a multi-author entry beginning with the same name.
- Two or more works by the same author and in the same year are distinguished by letters following the year.
- Second and subsequent authors' names are not inverted.
- Spell out "and" instead of using ampersand (&).
- Use quotation marks around book chapter titles, journal articles, and unpublished manuscripts.
- Use italic for book and journal titles, and Web titles.
- No comma between journal name and volume number.
- Use all numerals in inclusive page numbers (i.e., 155–156); page numbers follow publisher information, at end of citation. Use an en dash between numerals.
- Ordinals for editions, etc., are: 2d, 3d, 4th, 5th, ... 21st.
- Insert one space following periods that define separate items in the citation.
- One space between colon and page numbers.

References

- Use only an issue number OR a month/season (not both) for designating a journal issue; issue number is preferred.
- Issue numbers, months, or seasons are in parentheses, with no space between volume number and the following colon.
- Use zip code abbreviation for states (e.g. MI,WI, DC without periods); common cities do not need state identification.
- Use complete URLs for online publications (not simply the homepage URL). To break URLs, see Chicago (15th ed.) section 7.44. Insert the date that the online document was accessed by the author in parentheses at the end of the citation (accessed October 21, 2002). Italicize title of document, unless part of a larger publication (e.g., an article in an online newsletter). If the latter, follow style conventions for appropriate publication.

EXAMPLES

Journal article

Akerlof, George A., Lawrence F. Katz, and John E. Smith. 1996. "Workers' Trust Funds and the Logic of Wage Profiling." *Quarterly Journal of Economics* 111(4): 525–536.

Wilson, Michael A., and Deborah E. Smith. 1993. "Survey of the Unemployment Insurance Trust Funds." *Journal of Quarterly Economics* 111(Spring): 22–33.

Sites, Donald, and John L. Timmers. Forthcoming. "Pension Performance." *Economic Journal*.

Frankel, Jeffrey, and Francesco Giavazzi, issue editors. 2002. Special issue of the *European Economic Review* 46(6): entire issue.

Newsletter article

Earle, John S. 2002. "Evaluating Labor Market Performance: Employment Reallocation and Productivity Growth in Russia." *Employment Research* (July).

Blau, David, and Erdal Tekin. 2001. "The Determinants and Consequences of Child Care Subsidies." *Poverty Research News* 5(3): 1–3.

Newspaper article

[with byline]

Andrew Solomon. 2002. "Unemployment on the Rise Again." *New York Times*, October 14, C:33.

[Note: "C" is the section, "33" is the page number]

References

[no byline]

Wall Street Journal. 2002. Editorial, June 3, B:25.

Paper presented at a meeting or conference

Smith, Edward G. 1997. "Inflation and the Economy." Paper presented at the American Statistical Association conference, "Recent Economic Realities," held in Minneapolis, MN, March 14–17.

Unpublished manuscript and working paper

Hannah, Leslie G. 1990. "The Inventing of Retirement." Unpublished manuscript. Institute for Public Research, Minneapolis, MN.

Burdekin, Richard C.K., and Marc D. Weidenmier. 2002. "Suppressing Asset Price Inflation: The Confederate Experience, 1861–1865." NBER Working Paper No. 9230. Cambridge, MA: National Bureau of Economic Research. <http://papers.nber.org/papers/W9257> (accessed October 8, 2002).

[NOTE: NBER does not need to be spelled out in working paper no. because it is spelled out later in the publisher information. Date after URL is date when author accessed the document].

Lewis, Dan A., Irene Carvalho, and Bruce Nelson. 2001. "Identity, Work, and Welfare Reform: A Qualitative Analysis." IPR Working Paper No. WP-02-02. Evanston, IL: Northwestern University, Institute for Policy Research.

Chirinko, Robert S., and Gene D. Guill. 2002. "Aggregate Shocks, Loan Losses, and Portfolio Concentrations: Lessons for Assessing Depository Institution Risk." Working Paper No. 92.8. Chicago: University of Chicago, Harris School of Public Policy.

Institutional Author

Centers for Disease Control and Prevention. 2002. *CDC Fact Book, 2001-2002*. Washington, DC: CDC.

U.S. Census Bureau. *1997 Economic Census: Retail Trade*. Washington, DC: U.S. Census Bureau, Department of Commerce. <http://www.census.gov/epcd/ec02/2002promo.html> (accessed September 20, 2002).

[NOTE: No need to spell out organization on second mention, if abbreviation is commonly used. Include institutional departments (e.g. U.S. Census Bureau, Department of Commerce) where possible.]

Book

Maxwell, Nan L., and Victor Rubin. 2000. *High School Career Academies: A Pathway to Educational Reform in Urban School Districts?* Kalamazoo, MI: W.E. Upjohn Institute for Employment Research.

References

Edited book

Weber, Bruce A., Greg J. Duncan, and Leslie A. Whitener, eds. 2002. *Rural Dimensions of Welfare Reform*. Kalamazoo, MI:W.E. Upjohn Institute for Employment Research.

Danziger, Sheldon, ed. Forthcoming. *Economic Conditions and Welfare Reform*. Kalamazoo, MI:W.E. Upjohn Institute for Employment Research.

Chapter in an edited volume

Allen, Steven G., and Robert L. Clark. 1990. "Pensions and Firm Performance." In *Human Resources and the Performance of the Firm*, Morris Kleiner, ed. Madison, WI: Industrial Relations Research Association, pp. 195–204.

Chapter in the same edited volume

Weathers, Robert R. II, and David C. Wittenburg. 2009. "Employment." In *Counting Working-Age People with Disabilities: What Current Data Tell Us and Options for Improvement*, Andrew J. Houtenville, David C. Stapleton, Robert R. Weathers II, and Richard V. Burkhauser, eds. Kalamazoo, MI:W.E. Upjohn Institute for Employment Research, pp. 101–144.

Edition

Kleiner, Morris, ed. 1990. *Human Resources and the Performance of the Firm*. 4th ed. Madison, WI: Industrial Relations Research Association.

Revised edition

Danziger, Sheldon, ed. 2002. *Economic Conditions and Welfare Reform*, 2d ed., rev. Kalamazoo, MI:W. E. Upjohn Institute for Employment Research.

Volume

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Interviews and Personal Communications

See Chicago Manual of Style (15th ed.), 17.204–17.209.

Math & Numerals

- Numerals: spell out numbers 1–9, use numerals for 10 and above (one dog, nine rabbits, but 11 sheep). Use numerals for all quantities in a list in which numerals are mixed (e.g., 2 rabbits, 3 dogs, 11 cats, and 14 sheep). BUT:
 - Percent and other mathematical text, use numerals (4 percent; a factor of 2; 9.25).
 - Ages: Spell out number 1–9; use numerals for 10 and above: three-year-old boy; 10 to 12 years old.
 - Fractions: Spell out (one-third).
 - Large quantities: Use “million” and “billion” in place of numerals (17 million); but use numerals for thousands (17,000); however, Thousands of reporters were watching.
 - Never begin a sentence with a numeral; always spell out.
- Percentage. Spell out percent except in tables where “%” is to be used.
 - Ensure author has not confused percentage points with percent increase.
 - In range, do not repeat “percent” (Between 30 and 55 percent).
 - Never use fraction symbols; instead: 3.5 percent, 3.75 percent.
- Decimals: All decimal numbers smaller than 1 have a leading zero (0.43, not .43). If possible, limit digits right of the decimal to two; BUT author preference holds.
- Ordinals: Spell out in text: Twenty-first century; twentieth century (The student placed tenth in the competition.) In reference lists and tables: abbreviate: 1st, 2nd, 3rd, 4th, etc. (st, rd, etc. on baseline, same font size as text)
- Equations: [Equation numeral: Times New Roman, 12 pt, in full parentheses, 0.25 inch tab space between numeral and equation.] Place equation numeral on left side of equation. In text, spell out and capitalize “Equation” with numeral in parentheses: Based on Equation (1), the results indicate...
- Variables: Always italic. Variables include: a , b , c , x , etc.; p ; X , Y , N
- Vectors and matrices are not set in bold.
- Operators and functions: set in roman:
 - Δ [Delta: Times New Roman symbol: mathematical operator]
 - = [equal: keyboard stroke]
 - ex [exponential function; keyboard strokes] In text: Exp (n)
 - f [$y = f(x)$]
 - > [greater than: keyboard stroke]
 - \geq [greater than or equal to: Times New Roman symbol: mathematical operator]
 - < [less than: keyboard stroke]

Math & Numerals

\leq [less than or equal to: Times New Roman symbol; mathematical operator]

ln [natural log; keyboard stroke] [In text: log (v)]

– [minus: Times New Roman symbol, mathematical operator]

\times [multiply: Times New Roman symbol, mathematical operator]

\neq [not equal to: Times New Roman symbol, mathematical operator]







+

Σ [summation: Greek capital Sigma]

- Definitions, terms: Set in Small caps. (Examples: HUMCAP = ...; attitude I: Pay cuts are considered more fair. In house price.)
- Spacing: In text, insert spaces on both sides of equal, plus, and minus signs. In equations done in the equation editor, use thin spaces. Within tables, no spaces are necessary.
- Ellipsis points are always spaced: C1, C3, ... , Cn
- Currency: Spell out foreign currency at first reference in text; thereafter, use symbol preceding amount, no space. [e.g., DM3 million; US\$5,002]. Spell out million, but enumerate 1,000 and below: \$3 million; \$5,462. Do not include cents, if zero (e.g., \$54 vs. \$54.00). Repeat currency symbol in range. (\$54–\$65).













Proofreader's Marks

Delete and Insert






-  Delete, take it out
-  Delete and close up
-  Delete extra space
-  Insert space
-  Insert text
-  Correct letter

Punctuation marks











(use caret to show point of insertion)

-  Insert period
-  Insert comma
-  Insert colon
-  Insert semicolon
-  Insert quotation marks
-  Insert single quotes
-  Insert apostrophe
-  Insert question mark
-  Insert exclamation point
-  Insert hyphen
-  Insert parentheses
-  Insert dash
















Other

-  Spell out abbrev.
-  Check spelling
-  Let it stand
-  OK "with corrections"
-  or "as corrected"

Style of Type

-  Wrong font
-  Make lower Case
-  Set in LOWER CASE
-  capital letter
-  SET IN capitals
-  Set in Lower case with Initial Caps
-  Set in Roman type
-  Set in italic type
-  Set in lightface type
-  Set in boldface type

Paragraph and Position

-  Move to right
-  Move to left
-  Center
-  Move up
-  Move down
-  Flush left
-  Flush right
-  Align horizontally
-  Align vertically
-  Break, start new line
-  New paragraph
-  No new paragraph
-  run on
-  No paragraph indentation
-  Transpose letters, words, or