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Education Statistics

U.S. Department of Education
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NCES Style Guide

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Acting Commissioner

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Introduction

This document provides basic style guidelines for statisticians, researchers, project officers, writers, editors, contractors, and others who prepare and review reports and other publications for the public. The primary purposes of the style guide are to maintain consistency, correctness, and appropriateness regarding stylistic conventions, grammar, usage, and other areas related to producing publications; to inform users of policy and preferences in these areas; and to support compliance with the *NCES Statistical Standards* (NCES 2003-601).

The software standard of the U.S. Department of Education for presenting information is the Microsoft Office Suite, including Word, Excel, and PowerPoint. Therefore, a number of elements in this style guide have been tailored to efficient use of this software. For example, to support efficient use of Word, hyphens are used in lieu of en dashes. Authors may use en dashes for number spans if they prefer. Priority should be given to consistency within a document. Microsoft Word tips appear throughout the document and are marked, in the margin, by a ***W*** Tip logo; and appendixes provide additional Word shortcuts and tips, as well as guidance for producing figures and tables in Excel that meet the NCES standards. The two Excel appendixes can be downloaded as Excel files from the online version of this style guide.

To access clickable web attachments if you are using a hard copy of this document, go to http://nces.ed.gov/statprog and click on *NCES Style Guide* for the online document.

This guide draws heavily on the 1999 edition of the *OERI Publications Guide*. It also includes new and updated material and incorporates NCES directives about the areas covered. Other sources that were consulted include the following:

NCES Statistical Standards
United States Government Printing Office Style Manual, 2000 edition
The Chicago Manual of Style, 15th edition
Publication Manual of the American Psychological Association, fifth edition

When readers are directed to two or more of these resources for additional guidance on a section of this style guide, the first-named resource is the preferred one. To access a named resource if you are online, click on the underlined part of the reference (e.g., "standard 5-4").

This guide includes the following sections:

Abbreviations and Acronyms
Capitalization
Compound Words
Copyright, Brand Names and Trademarks, Permission
Cross-References
Definitions
Errata Sheets
Figures
Footnotes
Heading Styles and Levels
Internet and Other Technical Terminology
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In addition, appendixes provide the following resources:

Appendix A. Abbreviations List: Organizations, Agencies, Surveys, and Terms

Appendix B. Abbreviations List: States, the District of Columbia, Puerto Rico, Outlying Areas, and Freely Associated States

Appendix C. Abbreviations List: Countries (Partial List) and Canadian Provinces and Territories

Appendix D. Web Links to Standards, Style Manuals and Guidelines, and Dictionary

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Appendix F. Selected Proofreading Marks

Appendix G. Guidance for Producing Figures in Excel That Meet NCES Standards

Appendix H. Guidance for Producing Tables in Excel That Meet NCES Standards

Appendix I. NCES Graphic Standards for Publication and Other Product Covers, Title Page, and Back of Title Page

Achieving error-free publications: Producing and disseminating timely, accurate, and useful data is at the core of the NCES mission. Such data deserve a presentation that fully supports their quality. Errors of any kind in a publication can affect credibility. In addition to the quality control procedures you follow in producing your data, do the following to enhance quality in the reports you prepare—and to come as close as possible to achieving error-free publications: (1) familiarize yourself with this style guide and apply its guidelines in your work; and (2) be sure to build into your production process adequate time for careful editing and proofreading, before print release or release on the Web.

Abbreviations and Acronyms

Abbreviations are short forms of words or phrases used primarily to save space. They occur most frequently in technical writing, statistical material, tables, and notes. They may or may not use all capital letters, and they may or may not end with a period (e.g., Jr., Ph.D., MD, IES). Acronyms are simply abbreviations that are pronounced like words. Use standard and easily understood abbreviations, when possible, and be consistent throughout a document.

In a Microsoft Word document, to ensure that an abbreviated title (e.g., Rep.) is not separated from the name that follows it when the name falls at the end of a line (i.e., to create a nonbreaking space), hold down the Ctrl and Shift keys as you enter the space after the title.

See appendixes A through C for the following lists of abbreviations (including acronyms): appendix A for organizations, agencies, surveys, and terms; appendix B for states, the District of Columbia, Puerto Rico, outlying areas, and freely associated states; and appendix C for countries (partial list) and Canadian provinces and territories.

Spell out on first occurrence

Spell out the phrase to be abbreviated and follow it with the abbreviation in parentheses. Thereafter, use the abbreviation, eliminating the article in front of the abbreviation where possible. It is unnecessary to include an abbreviation if it will not be used subsequently.

Examples: Information provided by the Common Core of Data (CCD) includes the number of students and full-time-equivalent (FTE) teachers . . .

The National Education Longitudinal Study of 1988 (NELS:88) followed a cohort of 1988 eighth-graders through the year 2000. Because NELS:88 followed the cohort for 12 years, . . .

[Do not repeat a word that is in an abbreviation unless it would make sense with the abbreviation spelled out (e.g., "The NELS:88 study" is redundant).]

Repeat in major sections

In long works, repeat the full phrase (and the abbreviation) at the beginning of major sections of text and each appendix.

Match articles to the abbreviation

If you must precede an abbreviation with an article, use the one that works with the abbreviation, not the one required by the spelled-out form.

Examples: "an NCES report," *not* "a NCES report"

"an NCER program," *not* "a NCER program"

Use the article that sounds right with the pronunciation of the abbreviation, which may be either letter by letter, or as a word.

Examples: "an NSOPF brochure" (pronounced N Sof)
"a NPSAS brochure" (pronounced Nip Sass)
"an OPE report" (pronounced Oh P E)

Note apostrophe, plural, and possessive usage

Make all-capital abbreviations plural by adding lowercase "s" alone.

Example: LEAs, *not* LEA's

Generally use an apostrophe and an *s* to form the plural of an abbreviation that has two periods or that includes both capital and lowercase letters (Ph.D.'s); and generally add an *s* before the period in an abbreviation that has one period (vols., eds.).

When you use an abbreviation as a modifier, as in the following example, it is not necessarily a possessive form and generally does not require an apostrophe.

Examples: IES grants, *not* the standard possessive form, IES's grants
NCES surveys, *not* the standard possessive form, NCES's surveys

Use fiscal year (FY) abbreviation; AY and SY are optional

Spell out fiscal year at first use (use lowercase), followed by the abbreviation in parentheses. Thereafter, use the shortened version.

Example: Data are provided for fiscal year (FY) 1999, FY 2000, and FY 01. Many changes occurred between FY 99 and FY 01.

The shortened version uses two digits for all years except 2000.

If you choose to use the academic year (AY) and school year (SY) abbreviations, first introduce them, as explained for FY. With AY and SY, use six digits (e.g., AY 1997-98) except for AY 1999-2000.

For more details about year-span usage with FY, AY, and SY, see the Year Spans section of this style guide.

Outlying area and freely associated state abbreviations—not used in text

Spell out the names of these entities in text and, whenever possible, in table stubs. If abbreviations must be used in tables, define them in the table notes for each table that contains them.

Outlying areas include the following:

American Samoa	AS
Guam	GU
Northern Mariana Islands (Commonwealth of the)	MP
U.S. Virgin Islands	VI

Freely associated states include the following:

Federated States of Micronesia	FM
Marshall Islands (Republic of the)	MH
Palau (Republic of)	PW

When referring collectively to some or all of the above jurisdictions in, for example, tables that include states, use the term "Other jurisdictions." Explain in a note what jurisdictions you are including in the term, if not listing them separately.

These groupings (outlying areas and freely associated states) are listed in Part C—National Center for Education Statistics, within the Education Sciences Reform Act of 2002, which established the Institute of Education Sciences. (Since 1990, none of the entities listed above has been officially termed a *territory*.) Under section 158 of part C of the Act, the term *state* means each of the 50 states, the District of Columbia, and the Commonwealth of Puerto Rico.

State, DC, PR, and directional abbreviations—not used in text

See appendix B of this style guide for a list of the two-letter Postal Service abbreviations for states, the District of Columbia, and Puerto Rico.

Spell out the names of these entities in text and, if possible, in table stubs. If abbreviations must be used in tables, define them—or state that standard Postal Service abbreviations are used—in the notes for each table that contains them.

In addresses, use two-letter Postal Service abbreviations for states (TX, VA), the District of Columbia (DC), and Puerto Rico (PR). Do not use periods with directional abbreviations, such as NW and its counterparts.

Foreign country and Canadian province abbreviations—not used in text

See appendix C of this style guide for abbreviations of foreign countries (partial list) and of Canadian provinces and territories. These abbreviations are never used in text but may be used in tables when necessary. If abbreviations are used in tables, they must be defined in the notes to each table that contains them.

United States: Spell out as noun, abbreviate as adjective

Spell out United States when used as a noun; abbreviate it when used as an adjective.

Example: He emigrated to the United States and became a citizen; as a U.S. citizen, . . .
[Do not add a space between the two letters.]

U.S. Department of Education

Use *ED* as the abbreviation for the U.S. Department of Education. As with other abbreviations, spell out the Department name upon first use, give the abbreviation in parentheses following the name, and thereafter use the abbreviation. If you do not intend to use the abbreviation thereafter, do not introduce it. If your document includes only a few references to the Department, you may prefer to spell out each occurrence.

Department of Defense schools

The Department of Defense is abbreviated as DoD (note the lowercase "o"). On first occurrence of the term, spell it out and give the abbreviation in parentheses: Department of Defense (DoD).

The official DoD titles and abbreviations for the separate overseas and domestic components of the DoD education system for dependents are as follows:

DoDDS — Department of Defense Dependents Schools [the overseas schools]

DDESS — Department of Defense Domestic Dependent Elementary and Secondary Schools [in the United States]

Since the above abbreviations are not easily remembered and are not entirely self-explanatory, you are encouraged to use the following forms instead to refer to the two principal components of the DoD education system for dependents:

DoD schools (overseas)

DoD schools (domestic)

Use consistent terminology throughout your document. When an abbreviation such as DoD is used in a table, define it in the table footnotes if it is not already defined in the table stub.

When referring, in text, to all of the DoD schools for dependents, first clarify that you are referring to all of these schools, both overseas and domestic. If you wish to use a shorter phrase thereafter, you may add "(DoD schools)" in parentheses and subsequently use the shortened form. (In the following examples, note lowercase.)

Examples:

First use: Department of Defense overseas and domestic schools for dependents (DoD schools)

Subsequent use: DoD schools

First use, no subsequent use: Department of Defense (DoD) dependents schools (overseas and domestic)

Define abbreviations in tables

Define abbreviations used in tables in the notes at the bottom of the tables. For more guidance on table notes, refer to (or click on, in the electronic version of this style guide) appendix C of the *NCES Statistical Standards,* and see the Tables section of this style guide.

For guidance on abbreviations not specified in this section, see the rules and extensive examples in chapter 9 of the *United States Government Printing Office Style Manual* (2000 edition). (In the electronic version of this style guide, click on this underlined resource.) If you don't find the guidance you need there, see *The Chicago Manual of Style* (15th edition), chapter 15.

Capitalization

Use capitalization to give distinction, importance, and emphasis to words only when and where it is warranted.

Titles and headings

The titles and types of headings referred to in this subsection are as follows:

Title – title of report or other publication; title of chapter or equivalent main division
H1 heading – main heading level under title
H2 heading – heading level under H1
H3 heading – heading level under H2 (usually run in at the beginning of a paragraph)

Note that your publication does not have to use all of these levels of headings. For example, some publications use only titles and H1 headings, and many publications do not use H3 headings. See the Heading Styles and Levels section later in this style guide for more about appropriate styles to use in differentiating levels.

The table of contents generally includes two or three levels of headings. See "Contents page(s) and automatic generation" in the Parts of the Document section of this style guide for guidance on creating your contents page(s) automatically.

Capitalize most words in titles and higher level headings

In full or short titles of books, periodicals, series of publications, annual reports, and historic documents—and in chapter/report/article titles, H1 headings, and H2 headings—capitalize the following:

- the first word and all important words (e.g., nouns, pronouns, verbs, adjectives);
- prepositions and conjunctions of four letters or more (e.g., from, with);
- the second element of a hyphenated compound if it would be capitalized standing alone (e.g., Degree-Granting, College-Bound); the sole exception is the second element of a compound numeral (e.g., Twenty-third); and
- the first element of a hyphenated compound even if it would usually be lowercase (e.g., For-Profit).

Note that some publications may have designs that vary somewhat from the above. For example, the H2 headings may capitalize only the first word and proper names. If the style does vary from that described here, be sure it is consistent for each heading level throughout your document.

Do not capitalize the following unless they begin a title, subtitle, or heading (or comply with a specified style, e.g., to capitalize the name of a reporting category):

- the articles *a, an,* and *the;*
- the prepositions *at, by, for, in, of, on, to,* and *up;*
- the conjunctions *and, as, but, if, or,* and *nor;* and
- the word *to* as part of an infinitive (e.g., Collecting Data to Make a Difference…).

Use "sentence-style" capitalization in lower level headings

In H3 headings (the lowest level), as in sentences, capitalize only the first word and proper nouns (names, states, etc.).

In-text capitalization

This subsection describes and gives examples of three categories of capitalization in text (proper names, traditional usage, and specified style). Examples of terms commonly used in NCES reports are given in the list at the end of this subsection. For a much more extensive capitalization list, refer to (or click on, in the electronic version of this style guide) the *United States Government Printing Office Style Manual* (2000 edition), chapter 4.

Capitalize proper names

A proper name is the formal name of a specific person, place, program, study, survey, geographic area, or other entity. Capitalize proper names wherever they appear.

Examples: National Academy of Sciences, National School Lunch Program, Early Childhood Longitudinal Study, Lake Michigan, January, Vermont, England, Mary Jones

Lowercase "figure," "chapter," "appendix," etc., unless full title given

Lowercase and spell out "figure," "chapter," "table," and "appendix" in text, even when combined with a number indicating sequence (e.g., figure 3). However, if the full title is given, the word is considered a proper name and is capitalized (e.g., "Figure 1. Percentage of students enrolled in grades 1–12, by public and private school type: 1993, 1996, and 1999" and "Chapter 2. Arts Education in Public Elementary Schools").

Capitalize per traditional usage and specified style

Some words or phrases are capitalized according to traditional usage or specified style.

Traditional usage: Old Dominion (for Virginia), Great Depression, Third World, Eastern Europe, the East (section of the United States), Bluegrass region

Specified style: Black, White (racial designations); fall, spring, etc. (seasons)

When to capitalize the first word of a sentence following a colon

It is always permissible to capitalize the first word of a sentence (independent clause) following a colon. However, you may—but are not required to—lowercase the word after the colon if you wish to emphasize a close relationship between the independent clauses before and after the colon. (This is similar to the common practice of using a semicolon instead of a period to separate two closely related independent clauses.) Capitalizing the first word after a colon is *required,* however, when the first word is a proper name or when the colon introduces two or more sentences.

Refer to this list of commonly used terms

<u>Capitalize</u>

Advanced Placement (AP) courses

Black, White (and other racial/ethnic categories)

the East (*but* east coast)

English as a Second Language (ESL)

Individualized Education Program (IEP)

National School Lunch Program

United States of America (*but* the nation, a nation, national, the government, federal government, federally)

Washington State (*but* state of Washington)

Western Hemisphere (but western United States, western Pennsylvania)

Do not capitalize

algebra I (and other subjects of study)

computer-assisted telephone interviewing (CATI)

Department of Defense overseas and domestic schools

English language learners (ELL)

figure 3 (if no title given)

limited-English-proficient (LEP) students

winter (and other seasons)

Table and figure titles

For capitalization in table and figure titles, see the sample titles in the Figures and Tables sections of this guide. If you need additional guidance, refer to (or click on, in the electronic version of this style guide) appendix C of the *NCES Statistical Standards*.

For guidance on capitalization not specified in this section, see the rules and extensive examples in chapters 3 and 4 of the *United States Government Printing Office Style Manual* (2000 edition). (In the electronic version of this style guide, click on the underlined resource to access it.) If you do not find the guidance you need there, see the *Publication Manual of the American Psychological Association* (fifth edition), pp. 94-99.

Compound Words

Compound words are written either solid (closed up), open (with a space between words), or hyphenated.

Hyphens not always needed

Use restraint in forming hyphenated compounds of words used in normal, familiar sequence. For example, do not hyphenate "per capita expenditure," "per pupil expenditures," "high school students," or "elementary school grade." For more about the use of hyphens with compounds, see the rest of this section.

Comparatives usually not followed by hyphen

Do not use a hyphen in a two-word modifier, the first word of which is a comparative or superlative.

Examples: better paying jobs; higher level degree; best known teacher; higher performing students
but
good-paying jobs; high-level degree; well-known teacher; high-performing students

Exception: For uniformity of style in a sentence, hyphenate a comparative or superlative when using it in juxtaposition with a hyphenated compound (e.g., "The performance of middle-performing eighth-graders declined, while that of the highest-performing eighth-graders improved.").

"ly" words not followed by hyphen

Do not use a hyphen in a two-word modifier the first word of which is an adverb ending in "ly."

Examples: congressionally mandated report; federally funded program; highly praised teacher; nationally representative sample; poorly defined task; scientifically based research; statistically significant effects; unusually high percentage

Unit modifiers versus predicate adjectives

A unit modifier immediately precedes the word modified, whereas a predicate adjective follows the word modified. In most cases, compounds that are hyphenated when used as unit modifiers are open (with a space instead of a hyphen) when used as predicate adjectives.

Examples: well-qualified teacher; hard-of-hearing students; far-reaching effects; field-tested survey; pilot-tested survey
but
the teacher is well qualified; the students are hard of hearing; the effects are far reaching; the survey was field tested; the survey was pilot tested

Prefixes and suffixes closed up

Generally close up prefixes and suffixes to base words, except where the base word is capitalized (non-Hispanic, pre-World War II) or ambiguity is possible (preposition or pre-position; resort or re-sort). Also, use a hyphen with the prefixes *ex, quasi,* and *self* (ex-governor, quasi-academic, self-educated).

Make the following one word (e.g., coworker):

A compound beginning with	A compound ending with
anti	like
co	maker
counter	making
de	over
extra	person
inter	wide (see exceptions below)
intra	wise
meta	work
multi	
non (see exceptions below)	
over	
post	
pre	
pro	
re	
socio	
under	

When "non" takes a hyphen

As with other prefixes and as noted above, use a hyphen after "non" if it joins a capitalized word (e.g., non-English).

Also use a hyphen after "non" when the "non" modifies a modifier that is itself hyphenated (e.g., doctorate-granting):

Example: non-doctorate-granting institution

One way to make sense of and remember this rule is to realize that "non-doctorate-granting institution" means "not a doctorate-granting institution"; in contrast, "nondoctorate-granting institution" implies "an institution that grants nondoctorates."

When the suffix "wide" takes a hyphen

Close up (make one word) compounds ending in the suffix "wide" (schoolwide, citywide), with the following exceptions: hyphenate a compound ending in "wide" when it joins a proper noun (Houston-wide) or a noun of three or more syllables (government-wide).

Double vowels often separated by hyphen

Except after the short prefixes *co, de, pre, pro,* and *re,* which are generally printed solid (closed up), use a hyphen to avoid doubling a vowel (e.g., semi-independent) or tripling a consonant (e.g.,

shell-like). You may always hyphenate when necessary to avoid misunderstanding (e.g., cooperative, *but* co-op, *not* coop).

No hyphen used with the unit modifier "Title IV eligible"

Do not use a hyphen in "Title IV eligible institutions" or in similar "Title IV eligible" constructions.

List of compound words

n = noun
u.m. = unit modifier (a compound that precedes the word it modifies, e.g., "school-level" in "school-level statistics" and "afterschool" in "afterschool programs")
v = verb

If the part of speech is not specified below, the form listed is to be used in all cases.

achievement-level (u.m.)
afterschool (u.m.)
at-risk students
base-year (u.m.)
child care
codebook
coursetaking
cutoff (n, u.m.)
database
dataset
day care
day-to-day (u.m.)
decisionmaker
decisionmaking
elementary-level (u.m.)
extracurricular
field test (n, v)
field-test, field-tested (u.m.)
first-generation students
first-grader
first-time (u.m.)
follow up (v)
follow-up (n, u.m.)
full-time (u.m.)
government-wide
grade point average
home page
homework
homeschooling
homeschooled (u.m.)
inactive
inbound
in-depth (u.m.)
in depth (studied it in depth)
in-field (u.m.)
in field (teaching in field)
in-service (u.m.)
limited-English-proficient (u.m.)
low-income (u.m.)
mid-level (u.m.)
mid-1990s
midpoint
midsize (u.m.)
multistep
nonfederal
nongovernment
nonresponse
ongoing
online
on-site (u.m., adverb)
out-of-school (u.m.)
part-time (u.m.)
per pupil
pilot test (n, v)
pilot-test, pilot-tested (u.m.)
policymaker
policymaking
postsecondary
preschool
printout (n)
problem solving (n)
problem-solving (u.m.)
public school student
record keeping (n)

school-age children
school-based (u.m.)
school-level (u.m.)
schoolwide
socioeconomic
state-of-the-art (u.m.)
subject-matter (u.m.)
teenage
textbook
time frame
web page
website
white-collar
workforce
workplace

Note: "Level" is preceded by a hyphen when it is part of a two-word modifier (for example, state-, district-, and school-level data), except when the first word is a comparative or superlative (higher level class, highest level class).

For guidance not covered in this section, see the rules and examples in chapters 6 and 7 of the *United States Government Printing Office Style Manual* (2000 edition). (In the electronic version of this style guide, click on the underlined resource to access it.) If your question is not answered there, use an up-to-date dictionary to identify compound words that are now printed solid.

Copyright, Brand Names and Trademarks, Permission

For specific advice about any of the subjects treated very generally in this section, contact the Office of the General Counsel (OGC), U.S. Department of Education.

Copyright

Material originally created or produced by the U.S. Department of Education is in the public domain and is not subject to copyright. However, the U.S. government is not precluded from receiving and holding copyrights transferred to it by assignment, bequest, or other means. When appropriate to protect information (e.g., certain photographs) that is in fact protected by copyright, use the copyright symbol and year, and the copyright holder's name. *Also, always include the following "public domain" statement on the back of your title page: Unless specifically noted, all information contained herein is in the public domain.*

In some circumstances contractors supported by U.S. government funds can copyright material related to certain academic articles, journals, etc., without prior approval of the contracting officer (see 48 CFR 52.227-14); in other circumstances the contractor must obtain written permission from the contracting officer before establishing any claim to copyright (see 48 CFR 52.227-17). In general in these circumstances, the government retains the right to use the work and to authorize others to use it (in relatively rare instances, disputes may arise—e.g., after periods of nonuse).

Grantees may copyright any work developed under a government award that is subject to copyright, but the government retains the right to use the material for federal purposes and to authorize others to do so.

Brand names and trademarks

Use a generic term (photocopier) rather than a brand name that is a registered trademark name (Xerox) whenever possible. If a trademark name is used in the body of text as a proper name and not as a trademark (e.g., "The effects of the No Child Left Behind Act . . ."), it does not have to be accompanied by a symbol such as ® or ™. However, if a trademark name is to be used as a trademark, permission must be obtained first, and the appropriate symbol must be used with the first or most prominent mention of the trademark. If in doubt, consult OGC. Always avoid any impression of endorsement.

Permission

Permission must be obtained before using material copyrighted by third parties. In these cases, be sure to identify correctly who has the authority to grant such permission (the copyright holder, who may be the publisher or the author). If the use you contemplate falls under the *doctrine of fair use*, permission may not be necessary. "Fair use" may apply if the content is used for personal, education, or noncommercial purposes; if the author, source, and copyright information are cited; if the content is not altered; and if the user complies with any other terms or restrictions applicable to the document, image, or text. If in doubt, consult OGC.

Cross-References (within section you are in and to other parts of document)

Cross-references in text direct the reader to (1) related information in the section you are in (e.g., figures, tables, and footnotes), or (2) other parts of the document (e.g., appendixes, chapters or sections, or sources in the reference list). Cross-references should not be used unless they are clear and useful.

Cite in order (items within the section; appendixes)

When referring to figures, tables, and footnotes for the first time in the section you are in, always cite them consecutively (e.g., the second-mentioned figure is figure 2). If they have gotten out of order during rewriting, renumber or reletter them to keep the text references consecutive for each category. (For information on numbering or lettering tables and figures to indicate their order, see the Figures section of this style guide, under "Figure identifiers are different in different parts of report," and refer to (or click on, in the electronic version of this style guide) appendix C of the *NCES Statistical Standards*.) Also, appendixes should be lettered (e.g., appendix A, appendix B) in the order in which they are first cited in the document.

Verify agreement

Verify that referenced tables, figures, footnotes, and appendixes show what the text says they show.

Verify that text references to sources in the reference list agree with the information (authors and date) in the list. (For information on formatting and referring to a reference list, see the References section of this style guide.)

Lowercase references (if full title not given)

Lowercase "table," "figure," "chapter," and "appendix" when referring to them in the text, even when they include a number or letter indicating sequence. Capitalize them, however, if they begin a sentence or include the complete title of the item (e.g., "see Table 1. Public elementary and secondary schools in the United States: 1999-2000").

Place appropriately in sentence

Enclose a reference to a table or figure in parentheses at the end of the sentence in which its data are first mentioned, if the reference applies to all data in the sentence.

Example: The greatest percentage increases were reported for 15- to 19-year-olds (table B).

Refer to a table or figure after the first mention of its data when it does not apply to the rest of the sentence.

Example: About 34 percent of women were able to get jobs in their fields of study in the first year after graduation (table 1), while 66 percent of male graduates got such jobs (table 2).

Refer to other parts of your document by title, not page number

When referring the reader to another part of your report, avoid giving a page number. Instead, give the chapter/section number (if there is one), the title, or both. Page numbers inserted in text are a frequent cause of errors in published documents. It is easy to overlook changes in page numbers that occur during report development, and adequate checking is very time-consuming.

Examples: See chapter 4; see Appendix B. Methodology; see the Data Sources section, later in this chapter; see "Titles have special capitalization rules" in the Figures section

Definitions

Make sure all technical terms that are not defined fully in text are clearly defined in an appendix, technical notes section, glossary, or footnote. If there are numerous definitions, consolidate them in a glossary of definitions. In the glossary, alphabetize the terms. Do not capitalize the initial letter of a listing unless it would be capitalized in text. Lowercase or uppercase the listings as appropriate (as they would appear midsentence in text), to indicate correct style to the reader.

In tables, define terms in table notes. Tables should stand alone, without reference to other parts of the report.

Errata Sheets

For guidance on preparing errata sheets, refer to (or click on, in the electronic version of this style guide) standard 7-3-3 (under "Release and Dissemination of Reports and Data Products") of the *NCES Statistical Standards*.

NCES will arrange for the errata sheet to be distributed to recipients of the publication/product—that is, those who received it through the Department's publication distribution center (ED Pubs) or through the Government Printing Office (GPO) sales program. NCES must notify GPO to discontinue sales temporarily until NCES sends them enough copies of the errata sheet to be inserted in their current sales stock.

Figures

For more detailed guidance on figures than this overview contains, see standard 5-4 of the *NCES Statistical Standards*. Also, for details on figure notes, see the Tables section of this style guide and appendix C of the *NCES Statistical Standards*. (In the electronic version of this style guide, click on the underlined resources to access them.) For guidance on producing figures in Excel that meet the NCES standards, see appendix G of this style guide.

Note re nonprint media: In preparing and displaying figures, nonprint media should follow the recommendations of this style guide as far as is practicable. For additional guidance in this area, see the NCES web standards. Ensure that nonprint media comply with Section 508 accessibility requirements for people with disabilities. (Section 508 of the Rehabilitation Act of 1973 was reauthorized by the Workforce Investment Act of August 1998; standards for accessible technology were issued in December 2000 by the U.S. Access Board, an independent federal agency.)

Figures should have an identifier and title

Figures in NCES reports should have an identifier (e.g., figure A, figure 1, or figure A-1) and a title. Note the punctuation that follows the identifier: Use a period and a reasonable space between the number/letter of the figure identifier and the first word of the title. A tab may be used for this purpose. If the figure title following the identifier runs more than one line, each additional line must align with the first letter of the title in the first line (see sample figures in this Figures section). Appendix E of this style guide explains an efficient way to align runover lines of figure titles in Word documents, using the hanging indent feature, and also to ensure (even if the title does not have a runover line) that the list of tables can be easily generated automatically.

Figure identifiers are different in different parts of report

In executive summaries, use letters for figure identifiers, and letter the figures in alphabetical order (e.g., figure A, figure B). In the main body of reports, number figures consecutively (e.g., figure 1, figure 2). In appendixes, figure identifiers include both the letter of the appendix and a consecutive number (e.g., in appendix A: figure A-1, figure A-2).

Titles have special capitalization rules

In figure titles, capitalize only the first word, proper names, and the word following a colon.

Example: Figure 1. Percentage of public elementary and secondary staff, by type: School year 2001-02

All of the rules for figure titles are the same as those for table titles; for more information, refer to (or click on, in the electronic version of this style guide) appendix C of the *NCES Statistical Standards*.

Titles not footnoted

Do not footnote figure titles. Instead, put the information in a general note (i.e., the "NOTE").

Scales must match

Display entire scale increments, so that the highest value falls within the range of the highest increment. For example, if the highest value is 146 and the scale is in increments of 10, the upper limit should be at least 150.

NCES standard 5-4-4, #4: Use consistent scales with consistent spacing when presenting similar units of measurement.

For all figures with comparable units, use the same scale throughout a report (e.g., 0-10 percent should be the same size in all comparable figures; $0-$5,000 should be the same size in all comparable figures). Further, all scales showing comparable units should use the same scale increments (e.g., 10 percent increments in all rather than 10 percent in some and 5 percent in others; $500 increments in all rather than $500 in some and $400 in others).

Scale breaks should be clearly visible

NCES standard 5-4-4, #5: With the exception of time series, continuous scales should start with 0 or the minimum value of the scale. If used, scale breaks should be clearly visible.

Labels and legends text should be horizontal

Definitions: Labels—which are usually located under the *x* axis, atop the *y* axis, or alongside lines in a line graph or segments of a pie chart—describe the category being measured, unit of measure, or

value of what is being measured in a figure. (Note that in Excel, the words that define what the *x* axis and *y* axis measure are referred to as "axis titles" rather than "labels.") *Legends,* which may or may not be boxed, are keyed to parts of the figure (e.g., the colors of bars or of segments of a pie chart) and provide additional information (e.g., year of the data; category being measured). Legends are often placed in the blank space of a figure or under the *x* axis label.

Make text horizontal in labels and legends (see sample figures in this section). The parts of legends geared to the figure (e.g., shaded boxes geared to shades of bars in a bar chart) may be placed vertically or horizontally in the legend, but shades must be in the same order as in the figure (see bar chart example below). Capitalize the same way as in the figure title (see above). Box the legends if boxing will help the reader.

On the horizontal (*x*) axis, if labels abut or overlap, remove every other one (when possible) and lengthen the tick marks for the remaining labels. When it is not possible to remove every other label (as in the case of categorical labels), put the alternate labels at a lower level than the others, to retain all labels while keeping them horizontal. (See the following subsection regarding year labels.)

Tick marks should be outside the axis

Place tick marks outside the axis. Center scale numbers on the tick marks they identify. (See sample line graph below.)

If your data points are not at equal intervals of time (e.g., you have data for 1992, 1994, and 1998), place your axis labels at proportional intervals (i.e., show twice as much space between 1994 and 1998 as between 1992 and 1994). On the horizontal (*x*) axis, include a tick mark for every point for which you have data; omit tick marks where you do not have data. Label only the years with data points; but if there are too many to keep the labels horizontal, use tick marks without labels for intervening data points. (See the previous subsection regarding other types of data labels.)

Horizontal guidelines, if used, must be lighter than other elements

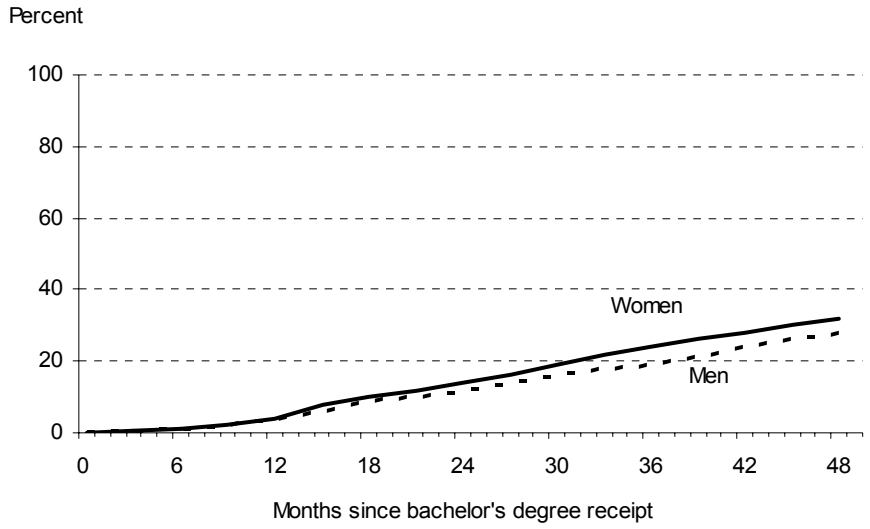
Horizontal guidelines may be used (but are not required) when they help the reader, as in line graphs. If used, they should always appear to be in the background, clearly lighter than other elements of the figure, and should not create a "busy" visual image (see sample graph below). Be consistent throughout your document in either using or not using horizontal guidelines in similar types of figures.

Line graphs should use distinctive lines and avoid geometric figures and legends

On line graphs, avoid placing geometric figures (squares, diamonds, etc.) on lines as a means of distinguishing them from one another. Instead, use lines that are dotted, dashed, or of various thicknesses. Geometric figures may be used on lines, however, (1) to indicate data points used as selectable targets in online interactive displays; and (2) in the rare instances when they are essential to communicating your meaning, as when the data points *differ* on multiple lines.

Even if lines are printed in multiple colors or shades, the line styles or patterns must be distinctive when photocopied in black and white. If possible, label the lines instead of using a legend.

Figure 2. Cumulative percentage married each month among 1992-93 bachelor's degree recipients who at the time of graduation had never been married, by gender: 1993-97



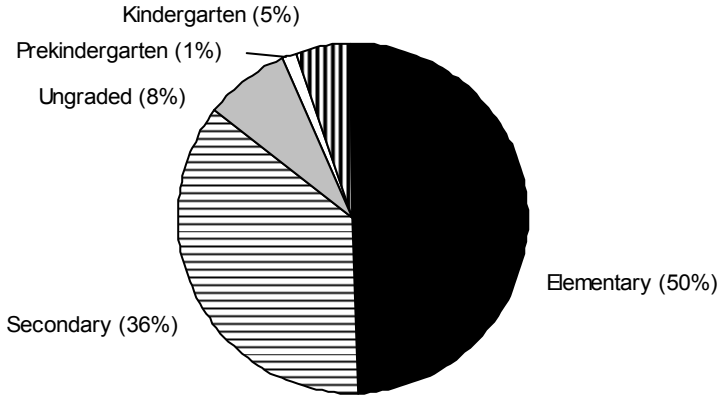
SOURCE: U.S. Department of Education, National Center for Education Statistics, 1993 Baccalaureate and Beyond Longitudinal Study, "Second Follow-up" (B&B:93/97), Data Analysis System.

Pie charts have labels outside the wedges

Place labels outside wedges. Do not draw a line from label to wedge unless the wedge arc is smaller than the type height. Wedges should be easily differentiated and legible when photocopied or printed in black and white (see sample pie chart below).

Orient pie charts so that one of the dividing lines between wedges is at 12 o'clock (see sample pie chart below).

Figure 3. Percentage of public elementary and secondary teachers, by level of instruction: School year 2001-02



NOTE: Detail may not sum to totals because of rounding.
SOURCE: U.S. Department of Education, National Center for Education Statistics, Common Core of Data (CCD), "State Nonfiscal Survey of Public Elementary/Secondary Education," 2001-02.

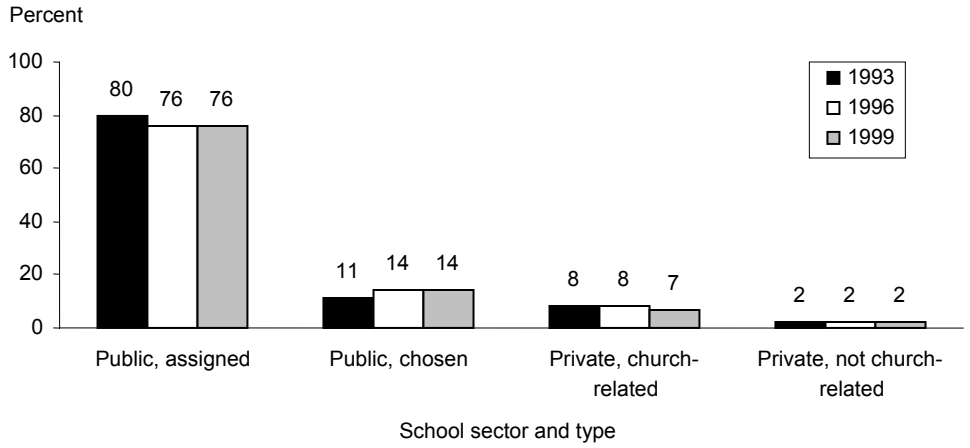
Bar charts have data labels, may have legends

If a bar chart includes a legend or other reference, the items identified in the legend (e.g., bar colors or patterns) should be in the same order as they are in the bars.

Bars should be easily differentiated when photocopied or printed in black and white (see sample bar chart below).

Label each bar to show the data represented.

Figure 4. Percentage of students enrolled in grades 1-12, by public and private school type: 1993, 1996, and 1999



NOTE: Includes homeschooled students enrolled in public or private schools for 9 or more hours per week. Detail may not sum to totals because of rounding.
SOURCE: U.S. Department of Education, National Center for Education Statistics, School Readiness Survey of the 1993 National Household Education Surveys Program (SR-NHES:1993); School Safety and Discipline Survey of the 1993 National Household Education Surveys Program (SS&D-NHES:1993); Parent and Family Involvement in Education/Civic Involvement Survey of the 1996 National Household Education Surveys Program (PFI/CI-NHES:1996); and Parent Survey of the 1999 National Household Education Surveys Program (Parent-NHES:1999).

Footnotes

Notes provide comments on and additional information relevant to the main text. When the information appears at the bottom of the page, the notes are called *footnotes*. When the notes appear all together at the end of chapters or at the end of the complete report, they are called *endnotes*. In NCES reports, use footnotes (see exception below under "Place on same page where referenced").

Note: NCES style calls for providing full documentation of bibliographic sources in a reference list, rather than in footnotes. To document your sources, include parenthetic references (author and date) in the text and full documentation in the reference list. For more information, see the References section of this style guide.

For guidance on table notes, see the Tables section of this style guide and the following two parts of the *NCES Statistical Standards*: standard 5-4 and appendix C. (In the electronic version of this style guide, click on the underlined resources to access them.)

Limit the number and length

Use footnotes sparingly. Use them only for material relevant to the discussion (for example, a definition or an explanation of some anomaly in the data collection).

Keep footnotes short.

Integrate

Check closely to see if all the footnotes are necessary. Integrate them into the text when appropriate.

Consolidate

If there are numerous footnotes containing definitions, consolidate those footnotes in a separate glossary of definitions.

Place on same page where referenced

Place each note at the bottom of the same page (and same column, if possible, in a two-column layout) on which it is referenced (i.e., use footnotes rather than endnotes). Use endnotes only as a last resort, when the number or size of notes makes footnote placement difficult. (*But* to avoid this necessity, follow the advice given above, under "Limit the number and length," "Integrate," and "Consolidate.")

Place superscripts after adjacent punctuation

Place superscript numerals that refer to notes after any adjacent punctuation in a sentence (except a dash).

Example: The second net tuition measure takes into account all grants—federal, state, institutional, and other.[1]

Place the superscript numeral earlier in a sentence if it does not apply to the entire sentence.

Example: About half (53 percent)[4] of the 10 percent of schools lending laptop computers reported that students could borrow them for 1 week or more.

Use Arabic numerals and number consecutively

In text, use Arabic numeral superscripts to refer to footnotes.

Number footnotes consecutively throughout the main body of a report (instead of numbering separately in each chapter or section). However, footnotes in the executive summary and in each appendix should be numbered separately from those in the main body of the report (so these parts of the report can stand alone); footnote numbering for the executive summary, the main body of the report, and each appendix starts with the numeral 1. Although renumbering footnotes (starting with 1) in each chapter is discouraged, it is acceptable in a long work with many notes.

Endnotes are discouraged; if they are used, however, begin numbering them with the numeral 1 in each new chapter.

Use asterisk for single footnote in text (see different rules for tables)

If there is only one footnote in the main body of the entire report (or in the entire executive summary or appendix), use an asterisk (*) instead of a number. This rule does *not* apply to tables or figures, where the asterisk has a special meaning. For symbols used in table notes and for the prescribed order of various types of table notes, see the Tables section of this style guide. For more about table notes, refer to (or click on, in the electronic version of this style guide) appendix C of the *NCES Statistical Standards*.

Separate adjacent superscripts

At times, more than one superscript may be attached to a word. Separate two or more superscripts attached to the same word with a hyphen (e.g.,[4-6]) or, if not consecutive, with a comma (e.g.,[2, 6]).

For guidance on footnotes not specified in this section, see the rules and extensive examples in chapter 15 of the *United States Government Printing Office Style Manual* (2000 edition). (In the electronic version of this style guide, click on the underlined resource to access it.)

Heading Styles and Levels

Titles and heading levels

The titles and headings referred to in this section are as follows:

Title	–	title of report or other publication; title of chapter or equivalent main division
H1 heading	–	main heading level under title
H2 heading	–	heading level under H1
H3 heading	–	heading level under H2 (usually run in at the beginning of a paragraph)

Capitalize per guidelines

See the Capitalization section of this style guide and the two sample heading schemes below for guidance on capitalizing titles and headings.

Make sure each level is consistent and easily distinguishable

Make sure to use a consistent style to identify each level of heading. Ensure that the titles and the H1, H2, and H3 headings differ enough so that the reader readily sees the differences and the hierarchy. Differences can be indicated by

- placement of headings (e.g., centered, left-justified, run-in);
- size and type of font (e.g., large to small; boldface or italic; same type of font as text or different font);
- capitalization style (higher levels of headings capitalize all important words, while H3s—and in some designs, H2s—capitalize only the first word and proper nouns); or
- a combination of these differences.

By using the Styles feature of Microsoft Word when entering your headings, you can ensure the all-important consistency of each heading level. That is, all H1 headings are the same size, style, and font, and all H2 headings are the same size, style, and font. Consistency of heading levels, and correct assignment of levels to your headings, helps maintain the logic of your report organization and flow.

For how to use the Styles feature of Microsoft Word to ensure consistency in headings at different levels, see appendix E (Microsoft Word Shortcuts and Tips) of this style guide.

Below are two examples of acceptable heading schemes.

Sample scheme 1

In this sample NAEP scheme, center and boldface titles and H1 headings; flush left and boldface H2 headings; and, for H3 headings, italicize and run in at the beginning of a paragraph. A run-in head should end with a period. An example of sample scheme 1 follows:

[Title] **2. Arts Education in Public Elementary Schools**

[H1] **Availability and Characteristics of Arts Education Programs in Public Elementary Schools**

[H2] **Characteristics of Music Instruction**

[H3] *Time devoted to instruction.* Among the 94 percent of regular public schools that offered music instruction, students in 6 percent of schools had music classes every day (table 2). Students had music classes three or four times a week in . . .

Sample scheme 2

In this sample scheme, set flush left and boldface titles, H1 headings, and H2 headings, differentiating them by type size. Italicize H3 headings and, in this scheme, place them on a separate line (like the other headings), rather than running them in at the beginning of paragraphs. An example of this scheme follows:

[Title] **Executive Summary**

[H1] **Results for Student Subgroups**

[H2] **Use of Computers**

[H3] ***Grades 4, 8, and 12***

Students at grades 4, 8, and 12 who used the Internet or CD-ROM materials . . .

Internet and Other Technical Terminology

The purpose of these guidelines is to maintain consistency in usage of the developing and ever-changing language of internet terminology. Because current style manuals lack established rules in this area, NCES authors should refer to these guidelines when using internet terminology.

Internet and other technical terminology usage

In text, use the following forms (note cap or lowercase; one word or more; hyphen or no hyphen) for internet-related and other technical terms (*but* cap the first letter of all of the terms shown lowercase when they begin a sentence). For additional guidance, see the NCES web standards. (Note that capitalized abbreviations shown below are not capped when or if they are part of path names or file names.)

CD-ROM

database, dataset, *but* data file

disk (for compact disk)

e-mail

FTP (file transfer protocol)

home page

HTML (hypertext markup language)

HTTP (hypertext transfer protocol)

the Internet (cap as proper noun following "the")

internet application (lowercase as adjective)

intranet

LISTSERV (see note at end of list)

online

PDF (portable document format)

printout (noun); print out (verb)

URL (uniform resource locator)

the Web (cap as proper noun following "the")

web address, web browser, web page, *but* website, webmaster (lowercase as adjective or compound)

World Wide Web

Note: LISTSERV is a trademarked, proprietary term; unless you know that is what is being used, you should say "electronic mailing list" rather than the more commonly used "listserv."

Internet and e-mail addresses (see Punctuation section)

See "Addresses (internet and e-mail)"—in the Punctuation section of this style guide—for the style to use for these addresses.

Lists

In general, displayed (i.e., set out) lists are used for emphasis when discussing key points in a publication. For the most part, displayed lists, whether bulleted or numbered, follow the same rules of punctuation that would apply in a sentence, except that semicolons rather than commas often are used to separate items. (Outline styles may also be used when appropriate for your material.)

Numbers are used in displayed lists only if needed

Do not number items in lists unless those numbers are referred to later in the text or are present to establish a sequence. If used, however, numbers in lists should be followed by a period and a space (click on the numbered list in the formatting toolbar of Microsoft Word for a standardized, acceptable style).

Example: To develop a bulleted list, do the following in order:

1. Write the information as one or more sentences; then divide the material into a series of list items.

2. Determine the type of punctuation needed for fragments or complete sentences.

3. Place a medium-size bullet in front of each item (click on the bullet list in the formatting toolbar of Microsoft Word for a standardized, acceptable style); avoid the use of stars, asterisks, or other distracting symbols.

4. Review the list, making sure that the items are parallel in construction.

Bullets are used in most cases

In most cases, use bullets in lists, following the rules of punctuation for a sentence, except that semicolons rather than commas are often used to separate items.

Example: Bulleted lists are used

- to organize thoughts;
- to give the eye a break; and
- to highlight salient points.

General rules apply to both bulleted and numbered lists

Note that certain other rules apply to displayed lists, as follows:

- Use a colon only when a complete sentence (often containing "the following" or "as follows") introduces the list, as in this example.

- Do not use a colon or other punctuation to introduce a list when the listed items complete the introductory phrase, as in the example above, under "Bullets are used in most cases."

- If the items form a list of fragments, as in the example under "Bullets are used in most cases," they begin with a lowercase letter; they are punctuated with semicolons; the next to the last item ends with "and" or "or"; and the final item ends with a period, just as a sentence would.

- If, on the other hand, each item forms a complete sentence, as in this example, each begins with a capital letter and ends with a period.

Parentheses are used only with list numbers integrated into text

When a numbered list is integrated into the text (not set out, or displayed, as in the above examples), parentheses surround the numbers.

Example: The goals are (1) to communicate clearly and logically, and (2) to comply with specified style.

Numbers and Rounding

Use the following as a general guide.

Numbers: Using words or numerals

Units of time and measurement, including percentages

Use Arabic numerals for units of time and measurement, including distance, percentages, proportions, decimals, degrees (of temperature), area, weight, age, scores, score levels, and mathematical expressions.

Examples: 10:00 a.m.; 5 miles; 12 months; 9 days; 8 percent; 6-year study, 18- to 25-year-olds

General use

Use Arabic numerals for numbers 10 or greater. Spell out numbers under 10 unless they are units of time or measurement, including distance, percentages, proportions, decimals, degrees, area,

weight, age, and mathematical expressions, or are part of a series in which one of the numbers is 10 or greater. The same rules apply to ordinals. (Note, however, that if cardinal and ordinal numbers appear in the same sentence, they are not considered part of the same series in terms of deciding whether to spell them out or use Arabic numerals. *Cardinal numbers* are numbers used in simple counting, such as 1, 2, and 12; *ordinal numbers* are numbers designating the place of an item in an ordered sequence, e.g., 1st, 2nd, and 12th.)

Examples: Of the books selected, two were fiction and five were nonfiction.

Of the books selected, 2 were fiction and 13 were nonfiction.

History was taught in the second, fourth, and sixth periods.

The groups included 2, 8, and 12 students, respectively.

The 2nd, 6th, 8th, 12th, and 14th students were accepted.

The report was the fifth in a series of 12.

In 1996, some 300 teachers left the profession. [See note below.]

Note: Avoid using only a comma to separate two numbers that are not part of a series (e.g., insert a word before the second number in "In 1996, 300 teachers …" so that it says, for example, "In 1996, some 300 teachers . . ."). If the second number is an exact rather than approximate number, however, either recast the sentence to separate the numbers or spell out one of the numbers.

Exceptions to the general-use rules:

Each school had eleven 10th grades.

[The purpose of the above exception is to aid clarity and readability, by not juxtaposing the two numerals (11 10th). Also spell out numbers of less than 100 that precede a compound modifier containing a figure (e.g., twenty 12-inch rulers).]

An exception may also be made to the general rule when there is a strong rationale for doing so. For example, if a report discusses the 6th, 8th, and 10th grades throughout, the general rule would call for "sixth" and "eighth" to be spelled out except when they appear in conjunction with "10th." However, it might distract the reader to continually switch back and forth between the numeric and spelled-out forms from sentence to sentence or paragraph to paragraph. In such a case, the authors would be justified in picking one form to follow throughout. Be consistent in your use of the selected style.

Ordinals with numerals—style: You may either use superscripts (e.g., 1st, 9th) or not use superscripts (e.g., 1st, 9th) in ordinals with numerals, but be consistent in your document.

To change the default style from one to the other in Microsoft Word, do the following: Click on the "Insert" drop-down menu, then click on "AutoText," and again on "AutoText." Select the "AutoFormat As You Type" tab. In the "Replace" list, click to insert a check mark by the "Ordinals (1st) with superscript" listing if you want superscripts thereafter; click to deselect the check mark if you do not want superscripts thereafter. Click "OK."

Sentence/heading beginnings

Write out years and numbers, including percentages, that begin a sentence or heading—or recast the sentence or heading.

Examples: Twelve people attended the meeting.

Two sophomores, 3 juniors, and 12 seniors responded to the survey.

Eight percent did not complete the questionnaire.

The year 1997 was a watershed in Europe.

Three-Year Limit for Grants [heading]

There were 20 fourth-graders in each grade 4 classroom.

Millions and billions

Write out *million* and *billion* but keep the accompanying numerals.

Examples: The population of the United States is more than 280 million.

The project cost $4.5 billion.

Numbers that cannot have a value greater than 1

For numbers that cannot have a value greater than 1, such as p values, do not insert a zero before a decimal (e.g., $p < .05$).

Decades

Do not use an apostrophe in *1990s*. Write out abbreviated decade references, such as *the eighties* (*not* the '80s or the 80's).

Examples: The 1950s were a time of great economic expansion.

During the nineties, boom times made everyone forget the cyclical nature of the economy.

Other examples

1st- through 12th-grade students
2 feet
3 credit hours
4 semester hours
1 month, 9 days
17-year-olds
nine students
two groups
three pages
first grade
K-12
grade 4
14 ninth-graders
chapter 1

Number spans

Hyphens or en dashes may be used in number ranges, such as spans of multiple dates, ages, years, percentages, and time periods. Use one or the other consistently throughout your document.

Examples: My high school years, 1994-97, were interesting times. (*or* My high school years, from 1994 through 1997, were interesting times.)

Twelve percent of students ages 12-18 reported . . . (*or* Twelve percent of students ages 12 through 18 reported . . .)

Note: In this context, "through" implies that the range includes the ending date/item; "to" implies that it does not. If you use "from," you must use "through" or "to." If you use "between," you must use "and." Never substitute a hyphen in these cases.

Examples: Between 1994 and 1997, . . . (*not* Between 1994-97, . . .)

From June to September 2003, . . . (*not* From June-September 2003, . . .)

Use a hyphen or an en dash to indicate a time period (such as a school year) that includes parts of two successive calendar years.

Examples: This report presents data for school year 1996-97.

This report presents data for academic years 1996-97 through 2000-01.

For more about academic, fiscal, and school years, see the Year Spans section of this style guide.

Rounding: Different types of data, different contexts

In general

A rounded value must be obtained from the original figure available, *not* from a series of roundings (e.g., 7.1748 can be 7.175 or 7.17 or 7.2 or 7 but *not* 7.18).

If the first digit to be dropped is less than 5, the last retained digit is not changed. If the first digit to be dropped is greater than or equal to 5, the last retained digit is increased by 1.

Examples: Rounded to three decimals, 6.1273 is 6.127

Rounded to two decimals, 6.6888 is 6.69

Rounded to one decimal, 5.4518 is 5.5

Rounded to a whole number, 5.49 or lower is 5; but 5.50 or higher is 6

All tables

Sums of column or row totals must be derived using unrounded numbers, with appropriate rounding of the total after its derivation.

Include the following note in all tables that include sets of cells that should logically sum to either 100 percent or a numeric total:

> NOTE: Detail may not sum to totals because of rounding.

Number of decimal places to be reported (excerpt from standard 5-3-5)

Standard 5-3-5, #1–6: Before rounding numbers for publication, a decision must be made about the appropriate number of decimal places to be reported using the following rules:

1. Percentages appearing in text must be rounded to whole numbers unless small differences require finer breakdowns. Summary tables must be rounded to no more than one decimal place.

2. Percentages appearing in reference and methodological tables must be rounded to no more than two decimal places except in certain methodological tables where finer breakdowns may be necessary.

3. Standard errors must be rounded to one decimal place more than the estimates for which they are computed.

4. Universe data may be reported unrounded. Sample survey data must be rounded.

5. A measured zero in a universe survey (i.e., none of something) must always appear in a table or a figure as 0. If rounding is used in a universe survey, numbers that round to zero must be represented in tables and figures by the symbol #.

   [Interpret the above NCES standard 5-3-5 directive about a measured zero in a universe survey as follows: In tables of universe data, the number of decimal places associated with a zero should equal the number of decimal places reported for other related estimates in the table.]

6. When dealing with small values in sample surveys, zero and numbers that round to zero must be represented in tables and figures by the symbol #. [*Note:* Their corresponding cells in an accompanying standard error table must be represented by the symbol †.]

For additional information on rounding, refer to (or click on, in the electronic version of this style guide) standard 5-3 of the *NCES Statistical Standards*. For more detailed guidance on the presentation of numbers in tables, see appendix C of the *NCES Statistical Standards*. For guidance on numbers that is not specified in this section or in the referenced sections of the *Standards,* see the rules and examples on the treatment of numbers in text in chapter 12 of the *United States Government Printing Office Style Manual* (2000 edition).

Pagination

Front matter: Use lowercase Roman numerals

Use lowercase Roman numerals (i, ii, iii, iv, . . .) to number the front matter pages of a report (title page, boilerplate on the back of the title page, executive summary or highlights, foreword, acknowledgments, contents page(s), and lists of tables and figures). Page numbers for the title page (i) and the back of the title page (ii) do not appear on the printed page. (For more about front matter and other parts of a document, see the next section of this style guide, Parts of the Document.)

Suppression of page numbers

In Microsoft Word, to start numbering front matter pages with the title page—but suppress (not show) the number on that page—do the following: While on the title page, click on the "Insert" drop-down menu, then on "Page Numbers"; in the dialog box, select the "Position" and "Alignment" you want for your page numbers from those two drop-down menus; deselect (uncheck) "Show number on first page"; finally, click on "Format" and select the "Number format" you want (i, ii, iii). Click OK in both boxes.

To suppress page number ii on the boilerplate page on the back of the title page, do the following: First (while still on the title page), click on the "Insert" drop-down menu, select "Break," and then select "Next page" break. This takes you to page ii; on page ii, select the "View" drop-down menu and then "Header and Footer." On the "Header and Footer" toolbar that appears, click on "Switch Between Header and Footer" to get into the footer. On that same toolbar, deselect "Link to previous" (if you have Microsoft Office 2003) or deselect "Same as Previous" (if you have Microsoft Office 2000) and close the toolbar.

To start visible page numbering on page iii (and use alternating odd/even page numbers thereafter), first (while still on page ii) add a section break ("Next page" type). That takes you to page iii; then, again click on "View" and "Header and Footer" and switch to the footer. Right align your cursor in the footer (you can use your regular toolbar to right align). Next, click on the "Page Setup" icon on the "Header and Footer" toolbar. In the "Page Setup" box, select "Layout." Then, select "Different Odd/Even"; deselect "Different first page"; select "Apply to: This section"; and click OK. Deselect "Link to previous" (if you have Microsoft Office 2003) or deselect "Same as previous" (if you have Microsoft Office 2000) and close the "Header and Footer" toolbar.

Thereafter, whenever you end one section on an odd-numbered page and want to leave a blank page before starting a new section on the next odd-numbered page, simply do the following: At the end of the completed section, insert a break ("Odd page" type). That will take you to the next odd-numbered page; and the page number will be suppressed on the skipped (blank) page.

Main body of report: Use Arabic numerals

Use consecutive Arabic numerals (1, 2, 3, 4, . . .) to number the pages in the main body of reports. To change the page numbering style (as when going from style i, ii, iii to style 1, 2, 3), enter a section break at the end of the old section. (Do this by clicking on the "Insert" drop-down menu, selecting "Break," and then selecting a "Next Page" break if you are on an even-numbered page, or an "Odd Page" break if you are on an odd-numbered page and want to start the new section and numbering on the next odd-numbered page.)

Then, while on the first page of the new section, click on the "Insert" drop-down menu, then on "Page Numbers"; in the dialog box, make sure the "Position" and "Alignment" remain as you want them to be. Select (check) "Show number on first page"; and finally, click on "Format" and do two things: select the "Number format" you want (1, 2, 3), and deselect (uncheck) "Continue from previous section."

Appendixes: In long reports, use alphanumeric page numbering

If a report is relatively short (say, 100 pages or shorter), you may wish to use consecutive page numbering with Arabic numerals throughout the report, including appendixes. For longer reports, however, separate alphanumeric numbering of each appendix helps orient the reader and is encouraged. Appendix A pages would be numbered A-1, A-2, A-3, etc.; appendix B pages would be numbered B-1, B-2, B-3, etc.

Positioning of page numbers

Be consistent in the positioning of page numbers in your document. Regardless of the orientation of material on individual pages (e.g., landscape tables as well as portrait), all page numbers should be either (1) on the outside of pages (i.e., on the right side of the page on odd-numbered pages and on the left side on even-numbered pages) or (2) at the bottom center.

Generally place page numbers at the bottom of pages (in the footer); however, if it better suits your document, you may place outside numbers (i.e., those that alternate between the left and right side) at the top of pages (in the header).

Positioning at the outside of pages is helpful when a document's purpose makes it likely that readers will be frequently looking for specific page numbers.

Parts of the Document

Front matter

Front matter refers to all of the material in your document that follows the cover and precedes the main body of the report. Pages of front matter generally are numbered with lowercase roman numerals (for more on numbering pages in the front matter, see the Pagination section of this style guide).

Sections and order of front matter

Your document may not include all of the front matter sections mentioned here. Use the following order for the sections that you do include: the title page, boilerplate on the back of the title page, executive summary or highlights, foreword, acknowledgments, contents page(s), list of tables, and list of figures. (Not all reports include an executive summary, highlights, or foreword.)

Title page and templates

The title page is the first page after the cover. Title pages of NCES reports follow a standard format. To access Microsoft Word templates for the standard title page format and boilerplate format for print or web-only publications, click on either title page/boilerplate templates—print or title page/boilerplate templates—web in the electronic version of this style guide. On the title page, the publication type, when relevant, is generally singular (e.g., Statistical Analysis Report, Issue Brief, E.D. TAB). To access Microsoft Word templates for the standard front cover and back cover formats, click on front cover/back cover templates in the electronic version of this style guide.

The title page and the boilerplate on the back of the title page are numbered as pages i and ii, but these numbers are suppressed so that they do not show on the pages. (See the Pagination section of this style guide for how to suppress page numbers.)

Boilerplate on back of title page

For NCES reports, material on the back of the title page follows a standard format. See the subsection above about accessing templates for the print version or the web version.

The back of the title page includes the Suggested Citation. (For the style to be used for the Suggested Citation, refer to the References section of this style guide, under the subsections "NCES publications" and "For Suggested Citation, use the style outlined in this References section.")

Executive summary or highlights

A brief executive summary or highlights section is required for E.D. TAB reports, statistical analysis reports, and technical reports when the body of the report exceeds 15 pages. However, NCES report types that are shorter, such as issue briefs, statistics in briefs, some E.D. TAB reports, and highlights brochures, typically do not include an executive summary or highlights.

The highlights are most often in a bullet-list format. When bullet items are introduced by a paragraph that summarizes many of the elements of an executive summary, the highlights section is comparable to a short executive summary.

For what should be included in executive summaries, refer to (or click on, in the electronic version of this style guide) checklist 7-2-A in standard 7-2 of the *NCES Statistical Standards*.

Foreword

A foreword is optional in NCES reports. In some reports, a foreword is a statement by an NCES person other than the author. In other NCES reports, the foreword is used by the authors as a brief (one- to four-paragraph) overview of the issues addressed by the report, source of the data, and how the data were produced. When the foreword is by the authors, it is unnecessary for them to add their names at the bottom of the message.

Acknowledgments

Acknowledgments for contributions other than authorship by both Department of Education staff and outside contributors should be placed on the acknowledgments page. If a contributor has changed affiliation since the time of contribution, both affiliations may be included. Keep this page brief, but be sure to identify major contributors to the content—e.g., internal and external reviewers, including IES and NCES staff and contractor staff, and the contracting officer—and to the artistic design of the publication.

Omit formal titles such as Mr., Mrs., and Dr.

Contents page(s) and automatic generation

Use *Contents* rather than *Table of Contents* as the heading for the list of the document's contents. Generally, use only two or three levels of heading in your contents page(s).

Include in the contents list all material that precedes the contents page, starting with the executive summary, if any; and use lowercase roman numerals to show front matter page numbers. Do not list the contents page itself, but do include the list of tables and list of figures. Finally, list sections in the main body of the report as well as all back matter, which includes appendixes (see back matter below).

To create the contents section automatically in Microsoft Word, do the following:

First, assign styles to headings: Use the Styles feature of Word to assign specific heading levels and styles to your document's headings. To do this, select the heading level of interest from the drop-down window that appears at the top and to the left on your screen (in addition to heading styles, the drop-down window lists other styles, such as "Normal" and "Default Paragraph Font"). Note that each heading level has an already assigned style (e.g., 16 pt, left-aligned for Heading 1). After selecting the level in the list, type your heading in your document; or, if you already have typed your heading, highlight it or put your cursor in it and then select the desired heading level. (If you want to modify a heading style before applying it to your headings, select "Format" on your toolbar and then click on "Style." In the "Style" box, select the heading level that you want to modify—e.g., "Heading 2"—and then click "Modify." In the "Modify Style" box that appears, click "Format" at the bottom of the box, and then click the attribute [e.g., font] you want to change. Click "OK" after changing each attribute you wish to modify. *Note:* Modifications made to a style apply automatically to all instances of that style throughout the document.)

Second, to generate the contents page(s), follow these steps:

1. Click where you want to insert the Contents section in your document. (It should follow the front matter sections, including executive summary or highlights, foreword, and acknowledgments, but should precede the lists of tables and figures.)

2. Select the "Insert" drop-down menu from your toolbar, click "Index and Tables," and then select the "Table of Contents" tab.

3. Before you click "OK," while still in the "Index and Tables" box, do two things:

    a. Use the "Formats" drop-down window at bottom left to view style options for the contents page(s) and select the one you want.

    b. If you want a different number of heading levels in your Contents section from that shown in the "Print Preview" window, click the "Show levels" up or down arrow to select the number of heading levels that you want to display.

4. Finally, click "OK" in the "Index and Tables" dialog box. Your Contents list will be inserted where you indicated in the first step above.

To learn more, or to resolve any problems you encounter, consult the Help feature on your toolbar.

List of Tables and List of Figures

The list of tables and list of figures in the front matter are separate lists. If helpful, you may include, within one or both of these lists, subheads indicating the general subject of groups of tables or figures. These subheads do not affect the numbering of tables/figures.

These two lists do not have to start on odd-numbered pages. They should, however, start on a new page—with the list of tables following the contents page(s) and the list of figures following the list of tables.

Insert the word "Table" at the top left of the list of table titles and the word "Figure" at the top left of the list of figure titles. Insert the word "Page" at top right over the page numbers that locate the tables/figures for the reader.

Body of the report

The body of the report (the material following the front matter and preceding the back matter) usually begins with an introduction. To see what should be included in a report, refer to (or click on, in the electronic version of this style guide) list 7-2-A in standard 7-2 of the *NCES Statistical Standards*.

Ensure that tables and figures included in the body of the report are numbered in the order in which they are described in the body of the report. Also ensure that table/figure numbers and

titles are accurately reflected in the list of tables and list of figures in the front matter. (For guidance on preparing tables and figures, as well as references to appropriate parts of the *NCES Statistical Standards*, see the Tables and the Figures sections of this style guide, as well as appendixes G and H.)

The report's list of references follows the body of the report. If a group of tables is included in the body of the report (rather than dispersed through the text), however, the reference list precedes these tables. (For guidance on preparing the reference list, see the References section of this style guide.)

Back matter

The back matter includes appendixes and, if any, the glossary and index; in NCES reports, a glossary most often is included in the form of an appendix. In addition to the glossary, the following—if appropriate for the particular report—are included as appendixes: technical notes, methodology, supplemental tables, and standard error tables. Other appendixes may be included, as appropriate for the document. (For guidance on numbering tables in appendixes, see the Tables section of this style guide; for guidance on numbering footnotes in appendixes, see the Footnotes section; and for guidance on numbering appendix pages, see the Pagination section.) Ensure that appendixes are lettered and included in the back matter in the order in which they are described in the body of the report.

Plurals

Below are words that have alternative plural forms. To ensure consistency in NCES publications, the list shows the singular form first, followed by the preferred plural form:

addendum, addenda

agenda, agendas

appendix, appendixes [parts of document]

compendium, compendia

consortium, consortia

criterion, criteria

curriculum, curricula

datum, data [always use plural verb with data]

formula, formulas

index, indexes [indices for scientific material or mathematical expressions]

matrix, matrices

memorandum, memoranda

referendum, referendums

schema, schemas

symposium, symposia

Do not use an apostrophe in plurals for dates (1990s) or for abbreviations (ABCs), except when an abbreviation has two or more periods or includes both capital and lowercase letters (Ph.D.'s). Use an apostrophe in plurals of single letters when it adds clarity (e.g., x's and y's instead of xs and ys). Write out abbreviated decade references, such as *the eighties*; do not use *the 80's* or *the 80s*.

Printing and Binding Regulations

Congress essentially reaffirmed, in appropriations law for fiscal year 2004, the law as stated in title 44 of the United States Code that "All printing, binding, and blank-book work for . . . every executive department . . . shall be done at the Government Printing Office [GPO]." Certain classes of work are excepted, including items of less than $1,000 in value and items not of a continuing or repetitive nature.

GPO provides a means, called a Small Purchase Agreement (SPA), by which agencies can place printing orders directly rather than through GPO by using contracts written by GPO. The SPA program requires agencies to develop their own specifications, call certified contractors, and make their own award. One contractor may be called for jobs of less than $1,000 in value; three contractors must be called for jobs over $1,000 and up to $2,500 in value. On all SPA orders, any problems that arise related to specifications, quality, or delivery must be resolved by the agency itself. On all GPO orders, such problems are handled by GPO. GPO orders carry a percentage charge to cover the contracting/procurement services provided by GPO, including development of specifications, the bidding process, award and contract administration, and problems of quality and delivery.

Printing through GPO puts the material in the public domain and ensures that the material is distributed through the Federal Depository Libraries. These libraries—many of which are college, university, and academic law libraries—serve as the public's primary source of free access to the published information of the federal government.

Punctuation

Punctuation is used to provide clarity and smooth transitions.

Addresses (internet and e-mail)

In electronic addresses designating websites on the Internet (uniform resource locators, or URLs), list the entire address on a single line, if possible. Break after slashes and punctuation, if necessary

to break; *but* never break addresses at hyphens, and never introduce hyphens into addresses. You may omit a slash found at the end of an address.

URLs begin with an abbreviation of the protocol used to deliver the electronic material to readers. The most common are hypertext transfer protocol (HTTP) and file transfer protocol (FTP). Lowercase protocol abbreviations when part of URLs. The protocol is followed by a colon, double forward slash, and then the publisher's domain name. Components following the domain name represent the path to the resource. These components are separated from the domain name and from each other by single forward slashes.

Include "www" in a URL only if the subject organization includes it in its published or distributed web address. For example, do not include "www" in the following URLs, even though they would work either with it or without it: nces.ed.gov; cnn.com; msnbc.com.

Highlight addresses by underlining them. This happens automatically in Microsoft Word, the standard for the Education Department. NCES style is to lowercase all parts of URLs and e-mail addresses unless case-sensitive applications require uppercase.

Examples: internet—http://nces.ed.gov/pubsearch

e-mail—john.doe@ed.gov

If an address comes at the end of a sentence, include a period to end the sentence (do not underline the period if it is not part of the address).

Addresses (postal) and telephone numbers

In postal addresses, do not use a comma before NW and its counterparts. Use hyphens in zip codes and telephone numbers.

Examples: 555 New Jersey Avenue NW
Washington, DC 20208

(202) 502-7300 *or* 202-502-7300 (be consistent in your document)

P.O. Box 1398
Jessup, MD 20794-1398

1 (877) 433-7827 *or* 1-877-433-7827 (be consistent in your document)

Apostrophe

To form the possessive of singular nouns, including those that end in *s* (boss), add an apostrophe and an *s*. To form the possessive of plural nouns ending in *s* (bosses), add an apostrophe only. Some irregular plurals (women) form the possessive by adding both an apostrophe and an *s*.

Examples: boss's, bosses'
citizen's, citizens'

datum's, data's

IES's; NCES's (but note that when you use an abbreviation as a modifier, it is not necessarily a possessive form and generally does not require an apostrophe and *s*, e.g., "IES grants" and "NCES surveys")

woman's, women's

one parent's education, both parents' education, one student's nationality

Comma

Use a final (serial) comma preceding "and" at the end of a series.

Example: The survey included responses from students, teachers, and administrators.

For placement of commas with quotation marks, see "Quotation marks," later in this section.

Dashes

Em dash

In printed publications, use an em dash (—) in place of two hyphens (--) to indicate a break in thought in the copy, or for emphasis. Do not leave a space between an em dash and the words that precede and follow it. Do not use em dashes where commas will suffice.

Example: Instructional faculty were asked about their use of various methods—lecture, seminar, lab, and fieldwork—as primary teaching methods in their classes.

To get an em dash (—) in Microsoft Word, do one of the following:

- Leaving no space after a word, insert two hyphens and continue typing; the hyphens convert to an em dash.
- While holding down the Ctrl and Alt keys, press the minus key at top right of the numbers pad.
- Select Insert, then Symbol, then Special Characters; select the em dash and Insert.

En dash

To support efficient use of Microsoft Word, hyphens are used in lieu of en dashes. Authors may use en dashes for number spans if they prefer. Priority should be given to consistency within a document. (To create an en dash in Microsoft Word, hold down the Ctrl key and press the minus key at top right of the numbers pad.)

Hyphen

Miscellaneous (e.g., zip codes)

For efficiency in Microsoft Word, use hyphens to separate the numbers in telephone numbers, zip codes, and NCES publication numbers.

Compound words

Hyphens are frequently used to connect elements of compound words, particularly if those words are used as unit modifiers.

Examples: 12-year-old students

12-year-olds (*but* 12 years old)

12- through 24-year-old students (*not* 12–24-year old students)

2- and 4-year institutions

less-than-4-year institutions

4-year-and-above institutions (but may use "4-year and above" when used without "institutions" in stub columns or as column head)

post-master's certificate

eighth-grader

evidence-based intervention

multiple-choice questions

two-thirds

For more about the use of hyphens in compounds, see the Compound Words section of this style guide.

Number spans (general)

Hyphens or en dashes may be used in number spans such as year spans and percentage spans. Use one or the other consistently throughout a report. For more about the style to be followed in presenting such ranges, see "Number spans" in the Numbers and Rounding section of this style guide, as well as the Year Spans section of this guide.

Preventing misunderstanding

Hyphens may always be used to prevent misunderstanding (e.g., co-op, *not* coop, for a shortened version of cooperative; re-sort, *not* resort, for "to sort again").

Quotation marks

Placement with other punctuation

Put commas and final periods inside quotation marks; put other punctuation marks outside quotation marks, unless they are part of the quotation.

Examples: This practice, often referred to as "tuition discounting," has grown rapidly in recent years.

Answers to this question were scored on three levels: evidence of "Full Comprehension," evidence of "Partial or Surface Comprehension," or evidence of "Little or No Comprehension."

Why call it a "gentleman's agreement"?

Be consistent in your use of quotation marks. Use double quotation marks (". . .") for quotes and to report direct speech. Use single quotation marks (' . . .') for a quote within a quote or a quote within direct speech.

Use when citing titles in text

Put in quotation marks, when citing in text, the titles of articles or features from periodicals and newspapers, as well as the titles of chapters, essays, and other selections from books.

General style issues

Always use curly quotation marks (". . ."), called smart quotes, rather than straight marks (' and "), which are used to denote feet and inches. In Microsoft Word, if you are not getting smart quotation marks, go to your toolbar and select the "Format" drop-down menu, then "Autoformat," then "Options," and check to replace straight quotes with smart quotes.
Do not use quotation marks to emphasize words. If special emphasis is needed and cannot be achieved by rewording, it can be accomplished by using—sparingly— italicized words or em dashes.

Similarly, words in text and headings should not be underlined or made all caps for emphasis (except for underlined web addresses). Using boldface in text for emphasis is discouraged; but in rare instances when italics or em dashes do not achieve the necessary emphasis, boldface may be used sparingly.

Slash

Use the slash (or solidus) to indicate alternatives, in fractions, and as a substitute for "per."

Examples: race/ethnicity

pupil/teacher ratio

Generally avoid the use of "and/or." Choose either "and" or "or," or else recast the sentence; a construction that uses ", or both" is often appropriate.

Example: Such organizations offer services designed to meet the needs of children, their parents, or both.

Exception: In densely technical sentences, when your meaning with "and/or" is clear—and use of the longer construction might result in ambiguity—you may use "and/or."

For guidance not covered in this section, see the rules and examples on the treatment of punctuation in text in chapter 8 of the *United States Government Printing Office Style Manual* (2000 edition). (In the electronic version of this style guide, click on the underlined resource to access it.)

Race and Ethnicity

Refer to (or click on, in the electronic version of this style guide) standard 1-5 of the *NCES Statistical Standards* for guidance on reporting on race and ethnicity.

Order of race/ethnicity categories in tables

Any one of the following three approaches is acceptable for ordering race/ethnicity categories in tables. Follow one of these approaches consistently within a document:

- *customary order*—White, Black, Hispanic, Asian, American Indian, Multiple races, and Other (with a footnote explaining the abbreviated categories);

  Footnote example: Black includes African American, Hispanic includes Latino, Asian includes Native Hawaiian or Other Pacific Islander, and American Indian includes Alaska Native. (If reporting the category Native Hawaiian or Other Pacific Islander separately, add Pacific Islander to the primary list; in the footnote, delete the Asian explanation and add the following Pacific Islander explanation: Pacific Islander includes Native Hawaiian.)

- *by size* (i.e., largest to smallest or smallest to largest, as appropriate for the subject); or

- *alphabetical* (this might be appropriate, for example, in a report focused on American Indians/Alaska Natives).

Race aggregations

In cases where the standard minimal reporting categories are considered inappropriate for particular programs or regions—and you need collective descriptions to make summary distinctions—you may use "White," "Black," and "All other races"; or "White" and either "Black

and other races" or "All other races." (References to "Black" in this paragraph assume that you have defined the term as including "African American.")

The term "non-White" is not acceptable as a racial/ethnic designation when reporting data. As an alternative in general discussion, you may use "races other than White" or similar phrases when appropriate.

References

Cite appropriate sources when supporting statements of fact

All statements of fact in reports must be supported directly either by data presented in the report or by a citation to the research literature. Such citations must be to refereed, peer-reviewed journals; to books published by companies known for their academic rigor; or to acceptable government reports. A list called "Refereed Journals in Education: A Nearly Complete (English-language) List" can be found at http://marauder.millersville.edu/~curricul/Refereed.htm. If the journal you are citing is not on the list and you are not sure it is peer-reviewed, please use the Internet to find that journal's instructions to authors, to verify its refereed status. Another website lists journals in the EBSCO database and indicates which are refereed. This list can be found at http://www.epnet.com/academic/acasearchprem.asp.

Exception: When you judge it appropriate and useful to cite one or more other types of sources (e.g., a newspaper, news magazine, or other general-audience periodical), in order to establish the relevance of a topic or issue, consult and gain the approval of your NCES project officer for such use as early as possible in the report development process.

Within your text, use brief, parenthetical references

When you refer to other publications within your text, place authors' names and the publication date in parentheses, with no punctuation between the last author's name and the date, as shown below. Key them to a reference list at the end of your publication. The style to use for legal citations, which are also included in the reference list, is shown near the end of this References section.

examples:

One work by one author:	*Principles illustrated*
(Duncan 1997) *or* In contrast, Duncan (1997) found that . . .	If possible, cite the name of individual author(s) instead of just an organization name.
(National Council for the Social Studies [NCSS] 1994) *or* Curriculum standards developed by the National Council for the Social Studies (NCSS 1994) provide examples of .. .	Cite an organization only if the work cannot be ascribed to individual authors. For the first mention of an organization that will be referred to again, define the acronym.

(NCSS 1996)	If you previously defined the acronym, no need to write out the entire name.
(Myers in press) ← ***non-NCES*** pub, accepted for publication, but not yet printed (Phyfe forthcoming) ← ***NCES pub***, not yet released	If a publication has not yet been printed or released, do not include the year. *Exception:* If an NCES pub has already gone to the printer or is available on the Web, include the year of release.
(Duncan 1997, p. 82)	When referencing a quotation or other *very specific* piece of information within a publication, include the page number.
(K.W. Schaie—personal communication, September 28, 1993) *or* Bill Joyner verified the information about his school in a telephone interview (March 20, 1993).	For personal communications—letters, memos, e-mail, phone conversations, etc.—include the initials or first name of the communicator and as exact a date as possible. Personal communications are *not* included in the reference list.

One work by multiple authors:	
two authors	(Celebuski and Farris 1998)
with page reference	(Celebuski and Farris 1998, p. 71)
three authors	(Haney, Madaus, and Kreitzer 1987)
with page reference	(Haney, Madaus, and Kreitzer 1987, p. 80)
four or more authors	(Choy et al. 1993)
with page reference	(Choy et al. 1993, p. 48)

Multiple works within the same parentheses:	
none of the works have page references	(Kolstad 1990, 1992) ← multiple works by single author (Choy et al. 1993; Henke et al. 1997) (Berkner and Chavez 1997; U.S. Department of Education 1997) (Herman, Aschbacher, and Winters 1992; Koretz et al. 1994; Wiggins 1993) ← works by different authors are ordered alphabetically by name of first author
one or more works have page references	(Celebuski and Farris 1998; Wirt et al. 1998, p. 45) ← works by different authors are ordered alphabetically by name of first author (Burstein et al. 1995, p. 36; Marshal, Fuhr, and Day 1994, p. 12)

*Works that have **identical author(s) and year of publication**:*	
within the same parentheses	(Smith 1995a, 1995b, 1995c)
in separate references	(Pepperburg and Funk in press–a) (Pepperburg and Funk in press–b)

*Works that have **same principal author, multiple other authors, and same year**:*	
Without page numbers	(Smith, Jones et al. 1992) (Smith, Harrow et al. 1992)

At the end of your publication, provide a detailed reference list

The reference list documents all sources that you referred to in the text, including print and electronic sources and legal citations, and allows readers to locate these sources. (See the end of this References section for the style to be used for legal citations.) *Prepare each entry carefully, making sure that it is accurate and complete.* Arrange the entries in alphabetical order by author name and, in the case of legal citations, name of legal citation. If more than one entry have the same author(s), arrange the entries by year of publication, with the earliest year first. *For details on arranging the list,* see the *Publication Manual of the American Psychological Association* (fifth edition).

General notes:

- For a multiple-author work, ***list all authors;*** do *not* use "et al." in a reference list.
- For an NCES publication, ***do not include a project officer*** who is not an author; always ***include the NCES number*** (in parentheses after the title, before the period).
- For works that have ***identical author(s) and year of publication***, add lowercase letters immediately after the date and alphabetize by title:

  Ingersoll, R. (1995a). *An Agenda* . . .

  Ingersoll, R. (1995b). *Teacher Supply* . . .

- Per NCES style, capitalize most words in the title, including prepositions with four or more letters.

Basic elements of individual entries:

<u>Periodical:</u>

Author, A.A., Author, B.B., Author, C.C., and Author, D.D. (1994). Title of Article. *Title of Periodical, nn*(n): nnn-nnn. ← pages

volume → issue

<u>Nonperiodical:</u>

Author, A.A., Author, B.B., Author, C.C., and Author, D.D. (1994). *Title of Publication.* Location: Publisher or printer (e.g., GPO).

<u>Part of nonperiodical (e.g., chapter of book):</u>

Author, A.A., and Author, B.B. (1994). Title of Chapter. In A. Editor and B. Editor (Eds.), *Title of Book* (pp. nnn-nnn). Location: Publisher or printer (e.g., GPO).

NCES publications:	*Notes*
<u>Standard pub, published and available through GPO:</u> Henke, R.R., Choy, S.P., Chen, X., Geis, S., Alt, M.N., and Broughman, S.P. (1997). *America's Teachers: Profile of a Profession: 1993-94* (NCES 97-460). U.S. Department of Education, National Center for Education Statistics. Washington, DC: U.S. Government Printing Office.	In the NCES number, use a hyphen to separate the year from the specific number. For pubs released in 1998 or earlier, use a two-digit year. For pubs released in 1999 or later, include all four digits of the year. ***Sample NCES numbers:*** 93-152 and 98-306; *but* 1999-104, 2000-585, and 2004-013

NCES pub available on the Web only: See "Works on the Internet," below.	
NCES pub that is *not* available through GPO: Bare, J., and Meek, A. (1998). *Internet Access in Public Schools* (NCES 98-031). U.S. Department of Education. Washington, DC: National Center for Education Statistics.	For the following types of NCES pubs, cite National Center for Education Statistics as the publisher, as shown in the example: ▪ Issue Brief • E.D. TAB ▪ Statistics in Brief ▪ Highlights brochure These types of publications cannot be purchased through GPO.
NCES working paper (also not available through GPO): Ingersoll, R. (1996). *National Assessments of Teacher Quality* (NCES 96-24). U.S. Department of Education. Washington, DC: National Center for Education Statistics Working Paper.	You can easily identify a working paper, because the NCES number has only two digits after the year (e.g., 1999-16). Working papers are not available through GPO.
Individual article within edited NCES pub: Goldhaber, D., and Brewer, D. (1997). Evaluating the Effect of Teacher Degree Level on Educational Performance. In W. Fowler (Ed.), *Developments in School Finance, 1996* (NCES 97-535) (pp. 199-208). U.S. Department of Education, National Center for Education Statistics. Washington, DC: U.S. Government Printing Office.	If a work forms part of another publication—i.e., is not separately published—its title is neither italicized nor in quotation marks.
NCES pub not yet released or sent to printer: Allen, N.L., Carlson, J.E., and Zelenak, C.A. (forthcoming). *The NAEP 1996 Technical Report* (NCES 1999-452). U.S. Department of Education. Washington, DC: National Center for Education Statistics.	If an NCES publication has neither been released nor sent to the printer, use the word "forthcoming" instead of a date. If a pub has been released on the Web but not yet sent to the printer, include the year of release. If a pub has been sent to the printer but not yet released in any medium, use the projected year of release.
NCES pub with NCES as author: U.S. Department of Education, National Center for Education Statistics. (2004). *The Condition of Education 2004* (NCES 2004-077). Washington, DC: U.S. Government Printing Office.	If the title page of an NCES pub does not list individual authors or editors, or lists only the project officer and supporting/ production staff, cite the agency as author, as shown at left. For more guidance on title page listings, see the Suggested Citation information later in this References section. For parenthetical text references to the example at left, use "(U.S. Department of Education 2004)."
NCES pub with NCES as both author and publisher: U.S. Department of Education, National Center for Education Statistics. (xxxx). *xxxxxxxxxxxxxxxxxx xxxxxxxxxxxxxxxxxxxxxxxxxxxxxx* (NCES xxxx-xxx). Washington, DC: Author.	When an NCES pub is not available from GPO—or you cannot be sure that it will be—cite NCES as the publisher; but do not repeat the agency name if NCES is also the author. Instead, cite "Author" as the publisher.
NCES pub with commission as author: National Forum on Education Statistics, Technology in Schools Task Force. (2002). *Technology in Schools: Suggestions, Tools, and Guidelines for Assessing Technology in Elementary and Secondary Education* (NCES 2003-313). U.S. Department of Education, National Center for Education Statistics. Washington, DC: U.S. Government Printing Office.	NCES sometimes publishes reports authored by commissions or forums that include large numbers of individuals from many different organizations. If a work is the product of a group and individual authors cannot be identified, cite the group as the author.

Joint product of NCES and another government agency: Chandler, K.A., Chapman, C.D., Rand, M.R., and Taylor, B.M. (1998). *Students' Reports of School Crime: 1989 and 1995* (NCES 98-241/NCJ-169607). U.S. Departments of Education and Justice. Washington, DC: National Center for Education Statistics and Bureau of Justice Statistics.	Individual authors are usually listed. In addition to the NCES number, the pub number from the other agency is also included if available. In this case, NCES and BJS are listed as the publishers because the publication was not available from GPO. If the publication were available through GPO, then GPO would be listed as the publisher.

U.S. government publications (non-NCES)	*Notes*
Individuals identified as authors: Myers, D., and Dynarski, M. (2003). *Random Assignment in Program Evaluation and Intervention Research: Questions and Answers* (NCEE 2003-5000). U.S. Department of Education, Institute of Education Sciences. Washington, DC: U.S. Government Printing Office. Kindermann, C., Lynch, J., and Cantor, D. (1997). *Effects of the Redesign on Victimization Estimates* (NCJ 164381). U.S. Department of Justice. Washington, DC: Bureau of Justice Statistics.	Cite individual authors if possible. Cite the agency's pub number if available. Cite GPO as publisher if available from GPO. If you're not sure about GPO availability and GPO is not cited anywhere on the publication's inside front cover, then cite the agency as publisher.
Commission as author (or as author and publisher): The Secretary's Commission on Achieving Necessary Skills. (1991). *What Work Requires of Schools: A SCANS Report for America 2000.* Washington, DC: U.S. Department of Labor. National Commission on the Cost of Higher Education. (1998). *Straight Talk on the Cost of Higher Education.* Washington, DC: Author.	Whenever the author and publisher are identical, use the word "Author" as the publisher.
Department as author: U.S. Department of Education. (1998). *Goals 2000: Reforming Education to Improve Student Achievement.* Washington, DC: U.S. Government Printing Office.	

Nongovernment publications	*Notes*
Standard book or published report: Lewis, A. (1989). *Wolves at the Schoolhouse Door: An Investigation of the Condition of Public School Buildings.* Washington, DC: Education Writers Association.	
Journal article: Shavelson, R.J., Baxter, G.P., and Gao, X. (1993). Sampling Variability of Performance Assessments. *Journal of Educational Measurement, 30*(3): 215-232.	Always include ▪ the volume number (italicized), and ▪ the issue number (in parens, no italics).
Pub with editor(s) instead of author(s): Wilson, H. (Ed.). (1997). *Punishment as an Educational Tool.* Montreal, Canada: Albemarle Leafnotes.	Use the same format as for a pub with author(s), but insert "(Ed.)" after a single editor's name or "(Eds.)" after multiple editors' names.

Article within edited pub: Haertel, E. (1991). New Forms of Teacher Assessment. In G. Grant and S. Smith (Eds.), *Review of Research in Education* (pp. 329-347). Washington, DC: American Educational Research Association.	
Newspaper article: Ravitch, D. (1998, August 10). Lesson Plan for Teachers. *The Washington Post,* p. A17.	Include the day of publication to identify the issue.
Magazine article: Connor, B.E. (1988, July/August). The Box in the Barn. *Highlights for Children,* pp. 18-22.	
Works on the Internet	*Notes*
NCES pub available on the Web only: Knapp, L.G., Kelly, J.E., Whitmore, R.W., Wu, S., and Gallego, L.M. (2003). *Postsecondary Institutions in the United States: Fall 2001 and Degrees and Other Awards Conferred: 2000-01* (NCES 2003-158). U.S. Department of Education. Washington, DC: National Center for Education Statistics. Retrieved March 23, 2005, from http://nces.ed.gov/pubsearch/pubsinfo.asp?pubid=2003158.	In the Suggested Citation for a web-only pub, include the following last line: "Retrieved [date] from http://nces.ed.gov/pubsearch." The citation user supplies the appropriate date. Include as much URL detail as you can.
NCES data file available on the Web: U.S. Department of Education, National Center for Education Statistics, Common Core of Data (CCD), "Local Education Agency Universe Survey," 2001-02, Version 1a. Retrieved [date] from [URL].	
Report available on the Web: United States Sentencing Commission. (n.d.) *1997 Sourcebook of Federal Sentencing Statistics.* Retrieved April 30, 2003, from http://www.ussc.gov/annrpt/1997/sbtoc97.htm.	If no report date is available, put "(n.d.)" (for "no date") after the author/agency name.
Speech available on the Web: Spellings, M. (2005, March 14). *A Quality Education for All Students.* Remarks prepared for delivery to the Governor's Commission on Quality Education at Annapolis, Maryland, by the U.S. Secretary of Education. Retrieved March 23, 2005, from http://ed.gov/news/speeches/2005/03/03142005.html.	If you must break the internet address (URL), do so after a slash or before a period. Be sure your word-processing program does not insert a hyphen.
Journal article available on the Web: [All of the usual journal citation information.] Retrieved April XX, 200X, from http://www.xxx.xxx/xxx/xxxx.	
Some special types of reference-list entries	*Notes*
Accepted for publication but not yet published (non-NCES): Ingersoll, R. (in press). Teacher Assessment and Evaluation. In D. Levinson, P. Cookson, and A. Sadovnik (Eds.), *Education and Sociology: An Encyclopedia.* Washington, DC: Garland Press.	If a non-NCES work has not yet been published, use the phrase "in press" instead of a date. Do not include page numbers for part of a larger work. For a journal article that has not yet been published, do not include the date, volume, or issue number.

	Note: For an *NCES publication* that has not yet been released, use the word "forthcoming" instead of a date. However, if the pub has been sent to the printer before being released, you may use the projected year of release.
Unpublished paper presented at a meeting: Truegrin, R.P. (1997, April). *Why Kids Stay in School.* Paper presented at the annual meeting of the American Educational Research Association, Los Angeles, CA.	
Specific edition of book: Cohen, E. (1994). *Designing Groupwork: Strategies for the Heterogeneous Classroom* (2nd ed.). New York: Teachers College Press.	
Publication available from Educational Resources Information Center (ERIC): Bailey, T., and Merritt, D. (1995). *Making Sense of Industry-Based Skill Standards*. Berkeley, CA: National Center for Research in Vocational Education. (ERIC ED389897)	Put the ERIC document number in parentheses at the end of the entry, as shown.

In publisher location, omit state or country name for internationally known cities

Follow the traditional practice of omitting a state abbreviation or country name for the following publisher locations, which are well known internationally as publishing centers:

Baltimore	New York	Amsterdam	Paris
Boston	Philadelphia	Jerusalem	Rome
Chicago	San Francisco	London	Stockholm
Los Angeles		Milan	Tokyo
		Moscow	Vienna

For Suggested Citation, use the style outlined in this References section

The Suggested Citation, which appears on the boilerplate page on the back of a report's title page, should comply with the standard style outlined above. *Exception:* For most reports it is safest to cite NCES as the source, since you usually can't be sure, at this point, whether the report will be available through GPO. For a web-only publication, add the following sentence at the end of a standard Suggested Citation: "Retrieved [date] from http://nces.ed.gov/pubsearch/pubsinfo.asp?pubid=200XXXX." Use the document's NCES publication number in place of "200XXXX." The citation users supply the date they retrieved the document.

If authors are listed on the title page, they should be listed first in the Suggested Citation. The project officer is not included unless he or she is also an author of the report.

Example: **Suggested Citation**

Adelman, C., Daniel, B., and Berkovits, I. (2003). *Postsecondary Attainment, Attendance, Curriculum, and Performance: Selected Results From the NELS:88/2000 Postsecondary Education Transcript Study (PETS), 2000* (NCES 2003-394). U.S. Department of Education. Washington, DC: National Center for Education Statistics.

- The authors and project officer of the report shown in the Suggested Citation above are listed on the title page of the report as follows:

  Clifford Adelman
  Institute of Education Sciences

  Bruce Daniel
  Pinkerton

  Ilona Berkovits
  National Center for Education Statistics

  Jeffrey Owings
  Project Officer
  National Center for Education Statistics

- *If the project officer of the above report had also been an author and had been listed in two places on the report title page—with the authors* and *as the project officer*— his name would have been included as one of the authors in the Suggested Citation. In this case, the report title page would look as follows:

  Clifford Adelman
  Institute of Education Sciences

  Bruce Daniel
  Pinkerton

  Ilona Berkovits
  Jeffrey Owings
  National Center for Education Statistics

  Jeffrey Owings
  Project Officer
  National Center for Education Statistics

Include legal citations in the reference list

Following is guidance on citing federal statutes, regulations, and administrative notices. Either a short version or the full citation may be given in text. Include the full citation in the reference list along with other references.

Federal statute

In a text citation for a federal statute, give the popular or official name of the act and the year of the act. To provide a print or electronic source, so the reader may access the statute cited, include the additional information in the reference list and also, if you wish, in the text.

A citation to the *U.S. Code* (U.S.C.), the *U.S. Code Annotated* (U.S.C.A.), or the *U.S. Code Service* (U.S.C.S.) is preferred for federal legislation, because it is easier to retrieve the law with such information than with a Public Law citation. When citing these code volumes, generally give the number and section of the volume and, in parentheses, the year the volume was published. (This publication year may be different from the year of the act.)

Example of citation to the U.S. Code *(U.S.C.):*

Text citation: National Education Statistics Act of 1994 *or* National Education Statistics Act (1994) [or you may use the full citation in text]

Full citation: National Education Statistics Act of 1994, 20 U.S.C. § 9001 et seq. (2002)

(You may use either a section symbol [§] or the abbreviation "sec." in citations, but be consistent in your document. To create a section symbol in Microsoft Word, press Alt plus 0167 [on the numbers pad at far right].)

Note that the *U.S. Code* is published every 6 years; the last year of publication was 2002. Thus, for example, the Education Sciences Reform Act of 2002, which established the Institute of Education Sciences, has not yet been codified. However, it is scheduled to appear at 20 U.S.C. § 9511. (See the Public Law and web citations to this Act below.)

If a law has not yet been codified (published in one of the code sources named above), it can be cited as a session law by giving its Public Law (P.L.) number and section, plus the "Stat." volume number and page number ("Stat." is the abbreviation for *United States Statutes at Large,* which is the official compilation of uncodified session laws). Finally, give the year (in parentheses) the volume was published.

Examples of citation to a Public Law:

Text citation: No Child Left Behind Act of 2001 *or* No Child Left Behind Act (2001) [or you may use the full citation in text]

Full citation: No Child Left Behind Act of 2001, P.L. 107-110, 115 Stat. 1425 (2002)

Text citation: Education Sciences Reform Act of 2002 *or* Education Sciences Reform Act (2002) [or you may use the full citation in text]

Full citation: Education Sciences Reform Act of 2002, P.L. 107-279, 116 Stat. 1940 (2002)

You may include a web source after any print source information by adding a comma and "retrieved [date] from [web address, or URL]." If the print source information is unknown, you may give a web source only.

Example of a citation to the Web:

Text citation: Education Sciences Reform Act of 2002 *or* Education Sciences Reform Act (2002) [or you may use the full citation in text]

Full citation: Education Sciences Reform Act of 2002, retrieved February 25, 2004, from www.ed.gov/policy/rschstat/leg/PL107-279.pdf

Federal regulation

If a final regulation has already been codified in the *Code of Federal Regulations* (C.F.R.), that is the preferred citation.

Example of citation to the C.F.R.:

Text citation: Teacher Quality Enhancement Grants Program
[or you may use the full citation in text]

Full citation: Teacher Quality Enhancement Grants Program, 34 C.F.R. § 611 (2003)

If a final regulation has not yet been codified in the C.F.R., cite to the *Federal Register*. (In a *Federal Register* citation, the number after "Fed. Reg." is the page number.)

Example of citation to the Federal Register:

Text citation: Teacher Quality Enhancement Grants Program
[or you may use the full citation in text]

Full citation: Teacher Quality Enhancement Grants Program, 65 Fed. Reg. 1780 (Jan. 12, 2000)

Administrative notice

Administrative notices are not codified in the C.F.R. Cite them to the *Federal Register*. The citation will look like the one above.

The following example is a citation for a National Assessment Governing Board notice of request for comments.

Example:

Text citation: National Assessment Governing Board (NAGB) Notice of Request for Comments (May 20, 1999) [or you may use the full citation in text]

Full citation: NAGB Notice of Request for Comments, 64 Fed. Reg. 27,520 (May 20, 1999)

For style guidance on references—including legal citations—that is not found in this section, refer to the *Publication Manual of the American Psychological Association* (fifth edition). Also, regarding legal citations, you may find it helpful to search the legislation, statutes, or regulations themselves for additional information or quotations. To do so from the electronic version of this style guide, click on the GPO gateway site, http://www.gpoaccess.gov/index.html, and browse the "GPO Access Resources by Branch" section. Search engines and extensive search tips are provided overall and within each subsection.

Statistical Symbols and Mathematical Operators: Style

Italicize letters used as statistical symbols, whether in text or tables. Examples include the following. Leave a space before and after mathematical operators such as = , +, and <.

t test

z test

F test

$F(1,53) = 10.03$

$a/b = c/d$

$p < .05$

se

r

$M = 8.19$, $SD = 7.12$

$N = 3{,}270$

$n = 520$

$t = 2.39$

$RRI^x = I^x/I - V^x$

For guidance not covered in this section, see the *Publication Manual of the American Psychological Association* (fifth edition), pp. 101 and 138-144. (Appendix D of this style guide lists a web address for an APA website, which provides style tips and other information but does not allow you to browse the *Publication Manual*.)

Survey Titles

In the titles of major surveys and their subsurveys, capitalize the important words. For more details, see "Titles and headings" in the Capitalization section of this style guide.

Do not enclose major survey titles in quotation marks. When citing a major survey and one of its subsurveys, put quotation marks around the subsurvey title only. In source notes for tables and figures, the name of the major survey always precedes the name of the subsurvey.

Following are some representative survey citations for source notes. Note, however, that there is variability across surveys in the precise style preferred. To comply with NCES style for the names, acronyms, and years of specific surveys, refer to (or click on, in the electronic version of this style guide) appendix D of the *NCES Statistical Standards,* which lists all surveys, their waves and components (or subsurveys), and the preferred style for each. Also, for your convenience, the abbreviations and titles of surveys—but not of subsurveys—are included (and asterisked) in the abbreviations list in appendix A of this style guide.

Examples:

> SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS), Fall 2001.
>
> SOURCE: U.S. Department of Education, National Center for Education Statistics, National Education Longitudinal Study of 1988 (NELS:88/92), "Second Follow-up, Parent Survey, 1992."
>
> SOURCE: U.S. Department of Education, National Center for Education Statistics, 2003-04 National Postsecondary Student Aid Study (NPSAS:04).
>
> SOURCE: U.S. Department of Education, National Center for Education Statistics, Common Core of Data (CCD), "Local Education Agency Universe Survey," 2001-02, Version 1a.
>
> SOURCE: U.S. Department of Education, National Center for Education Statistics, National Assessment of Educational Progress (NAEP) 1990, 1992, 1996, and 2000 Mathematics Assessments, NAEP Data Tool.

Order of source note information when data are from a report: (1) name of report, (2) survey information, and (3) agency (e.g., U.S. Department of Education, National Center for Education Statistics).

> SOURCE: *Revenues and Expenditures for National Public Elementary and Secondary Education: School Year 1997-98,* Common Core of Data (CCD), "National Public Education Financial Survey" (NPEFS), 1997-98, Version 1, U.S. Department of Education, National Center for Education Statistics.

Tables

For more detailed guidance on producing NCES tables than is summarized here, refer to (or click on, in the electronic version of this style guide) appendix C of the *NCES Statistical Standards*. For guidance on producing tables in Excel that meet the NCES standards, see appendix H of this style guide.

Note re nonprint media: In preparing and displaying tables, nonprint media should follow the recommendations of this style guide as far as is practicable. For additional guidance in this area, see the NCES web standards. Ensure that nonprint media comply with Section 508 accessibility requirements for people with disabilities. (Section 508 of the Rehabilitation Act of 1973 was reauthorized by the Workforce Investment Act of August 1998; standards for accessible technology were issued in December 2000 by the U.S. Access Board, an independent federal agency.)

Tables should have an identifier and title

Tables in NCES reports should have an identifier (e.g., table A in an executive summary, table 1 in the body of the report, or table A-1 in appendix A) and a title. Note the punctuation that follows the identifier: Use a period and a reasonable space between the number/letter of the table identifier and the first word of the title. A tab may be used for this purpose. If the table title following the identifier runs more than one line, each additional line must align with the first letter of the title in the first line (see sample table below). Appendix E of this style guide explains an efficient way to align runover lines in table titles in Word documents, using the hanging indent feature, and also to ensure (even if the title does not have a runover line) that the list of tables can be easily generated automatically.

Do not footnote titles

In table titles, as in figure titles, do not use a superscript number referring to a footnote. Instead, put the information in a general note (i.e., the "NOTE").

Title information follows a specified order

For guidance on the order in which information should be presented in table titles, refer to (or click on, in the electronic version of this style guide) appendix C of the *NCES Statistical Standards* and look under "Wording of Table Titles" in the Table Titles section.

Table identifiers are different in different parts of report

In the main body of a report, use consecutive Arabic numerals for table identifiers (table 1, table 2, etc.). In executive summaries, use letters for table identifiers, and letter the tables in alphabetical order (table A, table B, etc.). In appendixes, table identifiers include both the letter of the appendix and a consecutive number (e.g., in appendix A: table A-1, table A-2, etc.).

Sample table illustrates many NCES guidelines

The following is a sample table illustrating many of the NCES guidelines for tables.

Table 6. Number of public high school completers, by state: School year 1999–2000 — **Title**

State	High school completers			
	Total	Diploma recipients	Other high school completers	High school equivalency recipients[1]
United States	—	2,546,102	41,638 [2]	—
Alabama	43,459	37,819	2,535	3,105
Alaska	7,968	6,615	53	1,300
Arizona	—	38,304	375	†
.				
.				
.				
Wyoming	—	6,462	27	—

Boxhead: Spanner head — High school completers

Column heads — State; Total; Diploma recipients; Other high school completers; High school equivalency recipients[1]

Table body

Special notes

— Not available.
† Not applicable; no equivalency program.

Reference notes

[1] Includes recipients age 19 or younger, except in Minnesota, where they are age 20 or younger.
[2] Total other high school completers does not include New Hampshire, New Jersey, Washington, and Wisconsin.

General note

NOTE: High school completer categories may include students not included in 12th-grade membership.

Source note

SOURCE: U.S. Department of Education, National Center for Education Statistics, Common Core of Data (CCD), "State Nonfiscal Survey of Public Elementary/Secondary Education," 2000-01.

Align column heads at bottom of cells; right justify in columns (except stub head)

Align each column head at the bottom of the cell it is in (see the sample table above for correct alignment). This is a change from an earlier practice of vertically centering some column heads. Left justify the stub column head; right justify other column heads in columns.

In the body of tables, place footnote symbols/numbers to the right of column numbers—and flush right in empty cells

With columns of numbers: Keep all numbers aligned on the decimal. Symbols or superscript numbers referring to footnotes that are attached to numbers appear to the right of numbers (i.e., out to the right of the right-aligned numbers).

In empty cells: Align footnote symbols/numbers on the right in otherwise empty cells. They should align on the right, vertically, with all other symbols/numbers in the column (but not with superscripts attached to the numbers, which are out to the right of everything else in the column). Use parentheses *only* around superscript *numbers* in empty cells; superscript the parentheses as well as the number). *Do not* use parentheses with symbols.

Table notes follow prescribed order; symbols have special meanings

Use the following order in presenting table notes:

1. *Special (symbol) notes* are always listed first. The specific order to be used in listing the different symbols in table notes is shown below, under "*Special (symbol) notes and use of zero.*"
2. *Reference (numbered) notes* come after the special notes.
3. *The general "NOTE"* comes next.
4. *The "SOURCE" note* comes last.

Start each note on a separate line. Do not leave extra space between notes.

Spacing in notes after symbols/superscript numbers

In table notes, a thin space between the symbol or superscript number and the note it introduces usually looks best. Based on your judgment about what spacing to use—given your font and software—you may either (1) leave a thin space after each introductory symbol or superscript number, or (2) close up the symbol or number to the text that follows. Whichever style you choose, be consistent throughout your document.

The remainder of this subsection provides more information about using these types of table notes, including the specific order of special (symbol) notes, the associated labels to be used, and their meanings. The source of these guidelines is appendix C of the *NCES Statistical Standards*.

Special (symbol) notes and use of zero

Special notes are listed first, in the specific order shown below (include only those that are relevant to your table). In table notes, include the relevant symbols followed by their associated labels. (The symbols and labels always have the meanings shown on the right below.) If necessary or advisable, additional explanatory notes may be added to the end of relevant notes, after the standard label.

Symbols are used in appropriate cells in the body of tables and do not require parentheses. In tables, an asterisk is used *only* to represent statistical significance ($p < .05$), as shown in the following list:

Symbol	Label	Meaning
—	Not available.	Data were not collected or not reported
†	Not applicable.	Category does not exist
#	Rounds to zero.	The estimate rounds to zero
!	Interpret data with caution.	Estimates are unstable
‡	Reporting standards not met.	Did not meet reporting standard
*	$p < .05$.	Significance level

To obtain a dagger and a double dagger in Microsoft Word, do the following:

Dagger (†): Alt 0134 (Hold down the Alt key while typing 0134 on the numeric key pad at the right of your keyboard.)

Double dagger (‡): Alt 0135 (Hold down the Alt key while typing 0135 on the numeric key pad at the right of your keyboard.)

Note that there should be no zero before the decimal in the significance level label, $p < .05$, as shown in standard 5-1-5 of the *NCES Statistical Standards*. A zero was inadvertently included before the decimal in the list of symbols and labels in appendix C of the *Standards*.

Observe these special rules in the use of zero:

- A zero should not be used when a value rounds to zero; the # symbol should be used instead.

- A measured zero in a *universe survey* (i.e., none of something) must always appear in a table or a figure as 0. If rounding is used in a universe survey, numbers that round to zero must be represented in tables and figures by the symbol #.

  [Interpret the above NCES standard 5-3-5 directive about a measured zero in a universe survey as follows: In tables of universe data, the number of decimal places associated with a zero should equal the number of decimal places reported for other related estimates in the table.]

- Zeros should never appear in tables of *sample survey* data. When dealing with small values in sample surveys, zero and numbers that round to zero must be represented in tables and figures by the symbol #. *Note:* Their corresponding cells in an accompanying standard error table must be represented by the symbol †.

Reference (numbered) notes/superscripts

Reference notes, or numbered notes that refer to specific parts of the table, come after the special notes. The superscript numbers keyed to parts of the table are placed to the right of the word, heading, or data for which the note provides more information. If a superscript number referring to a reference note stands alone in a cell, enclose it in parentheses.

The order to follow in numbering reference superscripts in a table is generally line by line from left to right and down. Start numbering in the table boxhead. (The term *boxhead*, in this context, refers to the area above the body of a table that includes the stub column head, the other column heads, and the spanner heads, if any, above those column heads.)

First number the highest level heads in the boxhead (i.e., the spanner heads, if any); number from left to right across that level of heads. Then move down to the next level of heads and, again, number from left to right across that level of heads. For example, if all heads had superscripts attached in the sample table earlier in this section, #1 would be on the spanner head ("High school completers"), #2 would be on "State," #3 on "Total," and so on to the right. (If there are three different levels of heads in the boxhead—e.g., major spanner heads across the top of the boxhead, secondary spanner heads under those, and third, all column heads aligned along the bottom of the boxhead—and there are superscripts at each level, you will number from left to right three different times: first all top-level heads, then all middle-level heads, and finally all heads aligned at the bottom of the boxhead.)

Continue the numbering in the body of the table, line by line from left to right and down. For an example of the order of numbering superscripts in both the boxhead and the body of a table, see the sample table in appendix H of this style guide, under "Table Body," at the bottom of the page.

General note

The general "NOTE" comes after any special notes and reference notes. The general note qualifies, describes, or explains the whole table or easily identified parts of it. This note can include several types of information in different sentences. It can define abbreviations. When relevant, it is used to provide the statement, "Detail may not sum to totals because of rounding."

Source note

The "SOURCE" note comes last. For examples of source notes, see the Survey Titles section of this style guide. For additional guidance on the correct format for source notes, refer to (or click on, in the electronic version of this style guide) standard 5-4-5 in the *NCES Statistical Standards,* as well as appendix C of the *Standards.*

Detailed guidance is available on several additional topics

Appendix C of the *NCES Statistical Standards* provides detailed guidance on

- the three basic types of tables (summary, reference, methodological) and their placement;
- format types for tables (single-page tables with portrait orientation are preferred);
- table titles (identifiers, wording, placement, continuations);
- boxheads (parts of the boxhead, wording and punctuation, sequence of columns, spacing in column heads, units of measurement in column heads, column numbers or letters, breaking and hyphenating words);
- the table stub (organization, indentation, vertical spacing, wording and punctuation, leaders, line numbers, continuations);
- the body (units of measurement; spanners; decimals, zeros, and dollar and percent signs; placement of figures in column; arrangement of figures for ease of comparison);
- notes to tables (headnotes; special, reference, general, and source notes; the placement and style of referent symbols or numbers in cells, and the order of table notes); and
- sizing a table (pruning, internal revision, spacing reduction, font reduction).

Titles

For sample figure/table titles, see the Figures and the Tables sections of this style guide. For more detailed guidance on figure/table titles, refer to (or click on, in the electronic version of this style guide) appendix C of the *NCES Statistical Standards*.

For guidance on the styles and levels of report titles and headings, see the Heading Styles and Levels section of this style guide. For specific guidance on survey titles, see the *NCES Statistical Standards,* appendix D, as well as the Survey Titles section of this style guide.

Word Usage

Correct usage enhances readability, credibility, and clarity. This section includes words and phrases that are often used incorrectly. Some guidelines follow:

Affect/Effect

To *affect* something is to influence it or cause a change in it. To *effect* something is to produce it or accomplish it. An *effect* (n) is a result, accomplishment, or product.

Examples: His infectious laugh affected the mood in the room.
The program positively affected students' test scores.
The effect of the program was higher test scores.

"And/or"

Try to avoid the use of "and/or." This usually can be accomplished by simple rewording.

Example: Grant aid was available for programs offering before-school activities or after-school activities, or both.

not

Grant aid was available for programs offering before-school activities and/or after-school activities.

Exception: In densely technical sentences, when your meaning with *and/or* is clear—and use of the longer construction might result in ambiguity—you may use *and/or*.

Between/Among

In general, when two persons or things are involved, what happens is *between* them. When more than two are involved, it happens *among* them. An exception is when the action in a group is clearly *between* two persons at a time, or *between* subgroups of two.

Examples: The interactions between the two systems were well documented.
The cash award was distributed among the class.

Discussions between the United States, Britain, and France continued after the conference. [bilateral discussions]

Bi-, Semi-

As detailed below, the words *biweekly* and *bimonthly* both have conflicting dictionary definitions and are subject to misunderstanding. Therefore, it is recommended that you use, instead, terms such as "every 2 weeks" or "every 2 months." (If you nevertheless choose to use the terms *biweekly* and *bimonthly,* clearly define them at first use.) In contrast to these terms, s*emi-* has a consistent meaning (see the last paragraph of this subsection).

Biweekly, as a noun, usually means a publication issued every 2 weeks but can also mean a publication issued semiweekly (twice a week). As an adjective, biweekly also has two conflicting meanings: (1) occurring every 2 weeks, and (2) occurring twice a week.

Bimonthly is commonly used to mean occurring every 2 months; however, it also has a conflicting meaning: occurring twice a month.

Biannual means occurring twice a year. *Biennial,* however, means occurring every 2 years or lasting for 2 years.

Semi-, in relation to time periods, means occurring halfway through the period. For example, *semimonthly* means occurring twice a month; *semiweekly* means occurring twice a week; and *semiannual* means occurring twice a year.

Compared to/Than

In a sentence comparing two values, if the word *than* communicates your meaning as well as, or better than, the phrase *compared to*, use the more concise *than*.

Example: More girls than boys joined the choir.
not
More girls compared to boys joined the choir.

Complement/Compliment

The common usage of *to complement* is to complete or add to in a positive or constructive way.

Example: The second article complements the first, giving a balanced overview of the survey.

The usual meaning of *to compliment* is to pay a compliment to, that is, to express esteem, respect, or admiration.

Example: The agency complimented the authors for their definitive overview of the literature as of January 2003.

Composed of, *not* Comprised of

"Comprised of" is always incorrect. Comprise means encompass, include, or contain. Since "comprise" is frequently misused and can be misinterpreted, you are encouraged to avoid using it. Use the following types of alternatives:

Examples: The United States is composed of 50 states
The United States is made up of 50 states.

The school choice category consists primarily of programs that . . .

Consistent terminology

The goal of using consistent terminology when referring to the same entity is clarity for the reader. Alternating between, for example, "school," "college," and "institution" when referring to the same entity may confuse your audience. Keep the reader in mind as you decide what terminology to use—and how consistent you need to be.

Contractions

Do not use contractions in reports.

Examples: Use "is not" instead of "isn't"

Use "do not" instead of "don't"

Data

The word *data* always takes a plural verb (e.g., "the data are from three sources").

Degrees, academic

When referring to academic degrees in tables, figures, and text heads, use these forms: doctor's, master's, bachelor's, and associate's. To allow for variety of expression in text, however, the following may also be used there: doctoral (adjective), doctorate (noun), and baccalaureate (noun).

Different from, *not* Different than

Always use "different from" when what follows is a noun or pronoun (e.g., "girls are different from boys," *not* "girls are different than boys"; "my opinion is different from his," *not* "my opinion is different than his").

Education/Educational

The word *education,* generally used as a noun (e.g., a college education), may also be used as an adjective. In general, use *education* when you mean "about education," "having to do with education," or "governing education."

Examples: This education workshop is held twice a year.

The commentary was of particular interest to education researchers and policymakers.

Accurate data are critical to the formulation of education policy.

This report compares the American education system with education systems in other countries.

The presentation focuses on recent education reform efforts.

These indicators explore education equity for girls and women—that is, the extent to which males and females have access to the same educational opportunities.

The word *educational* (an adjective) is often used when referring to something that provides education or is instructive.

Examples: Add this to the packet of educational materials.
The workshop was a highly educational experience.

The word *educational* also is often used when referring to something that results from education.

Examples: This report examines the educational gains made by Black students in recent years.

A number of indicators shed light on the educational status of Hispanics in the United States.

The study examined the educational attainment of 25- to 29-year-olds.

The goal of the program is to track the educational achievement of students in selected schools.

A final note: Use the word *education* rather than *educational* when your meaning might be misconstrued if you did not. For example, "education statistics" clearly means "statistics about education," whereas "educational statistics" could mean "statistics that are educational"—that is, virtually all accurate statistics.

Fewer/Less than

Use *fewer* when referring to a number of different items. Use *less than* when referring to a quantity.

Examples: There were fewer students in the class than a decade earlier.

There are three fewer floors in the building than originally planned; as a result, there is less floor space overall.

Only one state had expenditures of less than $4,500 per pupil. [The $4,500 is considered an amount of money, rather than a number of discrete items.]

Less than 25 percent of the students entered the contest.

First person

Avoid using *I*. Avoid using *we* when referring to NCES offices or authors, except in acknowledgments and forewords.

Grade, -Grader (hyphen? numeral?)

When an ordinal grade number (e.g., fourth) precedes the word "grade," spell out numbers under 10 (*but* use numerals for all in a sentence that contains both numbers under 10 and numbers 10 or greater); use a hyphen only when the words are used as a unit modifier.

Examples: fourth grade, sixth-grade teacher, 10th grade

When the grade number follows the word "grade," preferred style is to use a numeral and not to use a hyphen.

Examples: grade 4, grade 6 schedule, grade 10

When the word "grader" follows the grade number, preferred style is to hyphenate the term.

Examples: fourth-grader, sixth-grader, 11th-grader

Exception to rule about numerals versus spelled-out ordinal numbers: In reports that discuss, for example, the 6th, 8th, and 10th grades throughout, an author may decide to consistently either spell out or use numerals for these ordinal numbers rather than switching back and forth frequently from one form to the other.

"His or her"

Avoid using "his or her" when possible. Instead, use plural nouns and then plural pronouns for reference.

Example: Teachers and their students . . . *instead of*

The teacher and his or her students . . .

i.e./e.g.

In text, preferred style is to place *i.e.* and *e.g.* and the accompanying phrase in parentheses. Always use a comma after *i.e.* and *e.g.*

Use *i.e.* when you mean "that is." Use *e.g.* when you mean "for example."

Examples: Put these abbreviations in parentheses (i.e., like this).

Use a noun (e.g., book) in that example.

Limited English proficient (LEP)/English language learner (ELL)

The term *English language learner* appears to be gaining favor over the term *limited English proficient* in describing those with limited English language skills. In NCES publications, however, be true to the language of the survey being reported (i.e., if the survey asked about LEP students or programs, use LEP; if it asked about ELL students or programs, use ELL).

Number of (singular or plural verb?)

As the subject of a sentence, "number of" can take either a singular or plural verb, depending on the context. As a general rule, "a number of" takes a plural verb and "the number of" takes a singular verb.

Examples: A number of arrests were reported near the school over the weekend.

The number of arrests near the school has risen steadily over the past 5 years.

You may also focus on which noun governs the verb, given the sense of the sentence. In the first example, the arrests are what were reported; in the second example, the number is what has risen.

Percentage/Percent/Percentage distribution/Share

Preferred usage is as follows: use *percentage* when no specific number is mentioned; use *percent* when a number is given.

Examples: A small percentage of the class participated.

They found that 12 percent of the class participated.

Figure 2. Percentage of public elementary and secondary teachers, by level of instruction: School year 2001-02

In a bar chart or line graph, use *Percent* rather than *Percentage* above a scale axis marked with specific percentages. Also use *Percent*, as appropriate, in the heading of a column showing specific percentages. Do not use such labels as *Percentage distribution* or *Percent enrolled* above an axis marked with the percent scale, since the axis does not itself show the distribution or the percent enrolled, but rather the scale by which those are measured.

When a figure or table shows a percentage distribution (i.e., allocation among categories that sum to 100 percent), you may include in the title (or headnote, if necessary) either "Percentage distribution" or "Percentage"; but be consistent in your choice of terminology for similar types of figures/tables throughout your document.

Always use *percentage* in the phrases *percentage distribution* and *percentage point. Avoid* use of the word *share* when you mean percent or percentage.

Spell out percent in text, headings, tables, and all figures except pie charts, unless space limits you to using "%."

Quartile/Quarter

Do not use the word *quartile* when you mean *quarter*. For example, use *upper quarter,* not *upper quartile*. In statistical usage, *quartile* refers to any of the three values that divide a frequency distribution into four parts.

Sex/Gender

NCES divisions differ on which term they prefer to use in their reports. Each division should select the preferred term and use it consistently.

"Technical/vocational education" or "Career/technical education"

Terminology is changing in this field. NCES now prefers, but does not require, the use of "career/technical education (CTE)" when referring to vocational, technical, or career education programs and schools. Use a slash rather than a hyphen in this context, and use consistent terminology throughout your report.

Through/To (meaning in ranges)

When reporting ranges, such as percentage, number, and year ranges, use of the word *through* implies that the range includes the ending percentage, number, or year; use of the word *to* implies that it does not include the last item. Be precise and consistent in your usage.

Voice (active or passive)

In general, the active voice is preferable to the passive voice. The active voice sounds stronger, crisper, and more direct.

Example: NCES implemented the program [active]
is usually preferable to
The program was implemented by NCES [passive]

Which/That

In general, use *which* to introduce a nondefining or parenthetical clause (one that is not essential to the meaning of the sentence); use *that* to introduce a limiting or defining clause (one that is a necessary part of the sentence). As shown below, always use a comma before the *which* in such a clause.

Examples: The course, which is required for graduation, is a favorite among sophomores.

Of the listed courses, the course that is required for graduation is the most popular among sophomores.

Who/Whom; Who/That

Use *who* when the person is the subject of the sentence or clause; use *whom* when the person is the object of the sentence or clause.

Examples: The percentages of children ages 5-17 who spoke English and no other language ranged from 13 percent to 97 percent in the 100 largest school districts in 2000.

Whom does she suspect?

Also, use *who* when referring to persons; use *that* when referring to things or organizations.

Examples: The curriculum is designed primarily for students who are beyond the compulsory age for high school.

It was the student-teacher committee that drafted the text.

Word forms/Spelling

Use shortened forms for words with variant spelling:

Examples: totaled, *not* totalled

leveled, *not* levelled

catalog, *not* catalogue

judgment, *not* judgement

acknowledgments, *not* acknowledgements

If unsure, check the spelling list and rules in chapter 5 of the *United States Government Printing Office Style Manual* (2000 edition). (In the electronic version of this style guide, click on the underlined resource to access it.) For words not in the GPO manual, refer to *Webster's Third New International Dictionary* (used by the Government Printing Office as a guide). *Merriam-Webster's Collegiate Dictionary* is also a useful guide; the examples given above, which are in the GPO manual, all reflect the first, or preferred, spelling listed in *Merriam-Webster's Collegiate Dictionary*.

Year Spans

A hyphen or an en dash may be used between years in year spans. Use one or the other consistently throughout a report. Express years in text or titles in the following ways:

1997 [calendar year]

1996-97 *or* 1996 through 1997 [span of calendar years]

1999-2000 *or* 1999 through 2000 [span of calendar years]

2000-01 *or* 2000 through 2001 [span of calendar years]

1996 and 1997 [two distinct calendar years]

fall 1997 *or* fall of 1997 [specific point in year]

fiscal year (FY) 1997 [at first use in text; use FY abbreviation after defining it, as discussed below]

FY 96 through FY 97 [for use in text after defining, as discussed below]

academic year 1996-97 [same for school year]

academic years 1990-91 through 1996-97 [same for school years]

In tables, if you use "School year ending" rather than "School year" as a stub or column head, you can then use single years (i.e., not a hyphenated span) under that head.

In text, lowercase and spell out "fiscal year" at first use and add the abbreviation in parentheses (FY). Do the same with "academic year" and "school year," if you choose to use the abbreviations AY and SY. Thereafter, use the abbreviation followed by a space and the appropriate year.
With FY, two digits are used for all years except 2000. With AY and SY, use six digits (except for 1999-2000) with a hyphen. Examples follow:

First use	Subsequent use
fiscal year (FY) 1997	FY 97
fiscal year (FY) 2000	FY 2000
fiscal year (FY) 1997 through FY 2001	FY 97 through FY 01
academic year (AY) 1997-98 [if you decide to use this optional abbreviation]	AY 1997-98
school year (SY) 1994-95 through SY 1998-99 [if you decide to use this optional abbreviation]	SY 1994-95 through SY 1998-99

Appendixes

Appendix A. Abbreviations List: Organizations, Agencies, Surveys, and Terms

Appendix B. Abbreviations List: States, the District of Columbia, Puerto Rico, Outlying Areas, and Freely Associated States

Appendix C. Abbreviations List: Countries (Partial List) and Canadian Provinces and Territories

Appendix D. Web Links to Standards, Style Manuals and Guidelines, and Dictionary

Appendix E. Microsoft Word Shortcuts and Tips

Appendix F. Selected Proofreading Marks

Appendix G. Guidance for Producing Figures in Excel That Meet NCES Standards

Appendix H. Guidance for Producing Tables in Excel That Meet NCES Standards

Appendix I. NCES Graphic Standards for Publication and Other Product Covers, Title Page, and Back of Title Page

Appendix A. Abbreviations List: Organizations, Agencies, Surveys, and Terms

Note: Asterisked items are surveys. For names of NCES survey components and waves, refer to (or click on, in the electronic version of this style guide) appendix D of the *NCES Statistical Standards*.

AAAS American Association for the Advancement of Science
AAC Association of American Colleges
AACD American Association for Counseling and Development
AACC American Association of Community Colleges
AACRAO American Association of Collegiate Registrars and Admissions Officers
AACTE American Association of Colleges for Teacher Education
AACU Association of American Colleges and Universities
AAHE American Association for Higher Education
AAPT American Association of Physics Teachers
AASA American Association of School Administrators
AASCU American Association of State Colleges and Universities
AAU Association of American Universities
AAUP American Association of University Professors
ACE American Council on Education
ACT American College Testing Program [definition no longer used; use "ACT" alone]
AECT Association for Educational Communications and Technology
AEL Appalachian Educational Laboratory
AEFA American Education Finance Association
AERA American Educational Research Association
AFT American Federation of Teachers
AGB Association of Governing Boards of Universities and Colleges
AIR Association for Institutional Research
ALA American Library Association
ALL Adult Literacy and Lifeskills
ALS Academic Libraries Survey*
AMS American Mathematical Society
AP Advanced Placement [courses]
ASA American Sociological Association; American Statistical Association
ASBO Association of School Business Officials
AY academic year
B&B Baccalaureate and Beyond Longitudinal Study*
BJS Bureau of Justice Statistics
BLS Bureau of Labor Statistics
BOTA Board on Testing and Assessment [part of NRC]
BPS Beginning Postsecondary Students Longitudinal Study*
BRT Business Roundtable
CAPE Council for American Private Education
CAPI computer-assisted personal interviewing
CASAS Quality Assessment and Accountability Systems
CATI computer-assisted telephone interviewing

CBE Council for Basic Education
CCA Career College Association
CCD Common Core of Data*
CCSSO Council of Chief State School Officers
CDN closing date notice
CEBP Coalition for Evidence-Based Policy
CEC Council for Exceptional Children
CEG Council for Excellence in Government
CGCS Council of the Great City Schools
CGS Council of Graduate Schools
CIP Classsification of Instructional Programs
CivEd 1999 Civic Education Study*
COFHE Consortium on Financing Higher Education
COOL College Opportunities On-Line
CP Capitol Place
CPB Corporation for Public Broadcasting
CPRE Consortium for Policy Research in Education
CPS Current Population Survey;* Central Processing System
CRESST Center for Research on Evaluation, Standards, and Student Testing
CRS Congressional Research Service
CSG Council of State Governments
CUPA College and University Personnel Association
DAS Data Analysis System
DASOL Data Analysis System On-Line
DDESS Department of Defense Domestic Dependent Elementary and Secondary Schools [in the United States]
DoD Department of Defense
DoDDS Department of Defense Dependents Schools [the overseas schools]
DOVE Data on Vocational Education
ECB electronic codebook
ECLS-B Early Childhood Longitudinal Study, Birth Cohort*
ECLS-K Early Childhood Longitudinal Study, Kindergarten Class of 1998–99*
ECS Education Commission of the States
ED U.S. Department of Education
E.D. TAB Education Data Tabulation report
E.D. TABs (plural of E.D. TAB)
ELL English language learner
ESL English as a Second Language
ERIC Educational Resources Information Center
ESRA Education Sciences Reform Act
ETS Educational Testing Service
EWA Education Writers Association
FCSM Federal Committee on Statistical Methodology
FICE Federal Interagency Committee on Education
FIPS Federal Information Processing Standards
FRSS Fast Response Survey System*
FTE full-time equivalent (full-time-equivalent as a modifier)
FY fiscal year
GAO Government Accountability Office

GED General Educational Development (generally refers to the GED credential)
GEPA General Education Provisions Act
GPO Government Printing Office [U.S.]
GRE Graduate Record Examinations
HBCUs Historically Black Colleges and Universities
HEGIS Higher Education General Information Survey*
HS&B High School and Beyond Longitudinal Study*
HSIs Hispanic Serving Institutions
HSTS High School Transcript Study*
IAEP International Assessment of Education Progress
IALS International Adult Literacy Survey*
IDEA Individuals with Disabilities Education Act
IEA International Association for Evaluation of Educational Achievement
IEL Institute for Educational Leadership
IEP Individualized Education Program
IES Institute of Education Sciences
IPEDS Integrated Postsecondary Education Data System*
IRA International Reading Association
LAB Northeast and Islands Laboratory at Brown University
LAN local area network
LEA local education agency
LEP limited English proficiency; limited-English-proficient
McREL Mid-continent Regional Educational Laboratory
NAAL National Assessment of Adult Literacy*
NAB National Alliance of Business
NABE National Association for Bilingual Education
NABSE National Alliance of Black School Educators
NACAC National Association of College Admission Counselors
NACCAS National Accrediting Commission of Cosmetology Arts and Sciences
NACME National Advisory Council on Minorities in Engineering
NACUBO National Association of College and University Business Officers
NAEP National Assessment of Educational Progress*
NAESP National Association of Elementary School Principals
NAGB National Assessment Governing Board
NAICU National Association of Independent Colleges and Universities
NAIS National Association of Independent Schools
NALS National Adult Literacy Survey*
NAPE National Association of Partners in Education
NAS National Academy of Sciences
NASBE National Association of State Boards of Education
NASDC New American Schools Development Corporation
NASDSE National Association of State Directors of Special Education
NASFAA National Association of Student Financial Aid Administrators
NASULGC National Association of State Universities and Land Grant Colleges
NASSP National Association of Secondary School Principals
NBES National Board for Education Sciences
NCAA National Collegiate Athletic Association
NCATE National Council for the Accreditation of Teacher Education
NCEA National Catholic Educational Association

NCEDL National Center for Early Development and Learning
NCEE National Center for Education Evaluation and Regional Assistance; National Commission on Excellence in Education
NCER National Center for Education Research
NCES National Center for Education Statistics
NCHEMS National Center for Higher Education Management Systems
NCLB No Child Left Behind Act
NCLIS National Commission on Libraries and Information Science
NCREL North Central Regional Educational Laboratory
NCRVE National Center for Research in Vocational Education
NCSL National Conference of State Legislatures
NCSS National Council for the Social Studies
NCTE National Council of Teachers of English
NCTM National Council of Teachers of Mathematics
NCVS National Crime Victimization Survey*
NEA National Education Association
NEDRC National Education Data Resource Center
NEH National Endowment for the Humanities
NELS:88 National Education Longitudinal Study of 1988*
NFP notice of final priorities
NGA National Governors Association
NHES National Household Education Surveys Program*
NIES National Indian Education Study*
NLE National Library of Education
NLS:72 National Longitudinal Study of the High School Class of 1972*
NMSA National Middle School Association
NPEC National Postsecondary Education Cooperative
NPSAS National Postsecondary Student Aid Study*
NRC National Research Council
NSBA National School Boards Association
NSF National Science Foundation
NSoFaS National Study of Faculty and Students*
NSOPF National Study of Postsecondary Faculty*
NSSC NAEP State Service Center
NWREL Northwest Regional Educational Laboratory
OBEMLA Office of Bilingual Education and Minority Languages Affairs [name changed; see OELA below]
OCLC Online Computer Library Center
OCR Office for Civil Rights
OECD Organization for Economic Cooperation and Development
OELA Office of English Language Acquisition
OERI Office of Educational Research and Improvement [replaced by Institute of Education Sciences (IES)]
OESE Office of Elementary and Secondary Education
OIE Office of Indian Education
OMB Office of Management and Budget
OPE Office of Postsecondary Education
OSEP Office of Special Education Programs
OSERS Office of Special Education and Rehabilitative Services

PEQIS Postsecondary Education Quick Information System*
PIRLS 2001 Progress in International Reading Literacy Study*
PISA Program for International Student Assessment*
PLS Public Libraries Survey*
PREL Pacific Region Educational Laboratory
PSS Private School Universe Survey*
RBS Research for Better Schools
RCG Recent College Graduates Study*
RLIN Research Libraries Information Network
SASS Schools and Staffing Survey*
SAT Scholastic Assessment Test
SBIR Small Business Innovation Research Program
SCS School Crime Supplement to the National Crime Victimization Survey [in this case, SCS represents only "School Crime Supplement"]*
SDDB School District Data Book
SEA state education agency
SED Survey of Earned Doctorates Awarded in the United States* [in this case, SED represents only "Survey of Earned Doctorates"]
SEDL Southwest Educational Development Laboratory
SHEEO State Higher Education Executive Officers
SIPP Survey of Income Program Participation*
SOICCs State Occupational Information Coordinating Committees
SSOCS School Survey on Crime and Safety*
STDS Survey of Teacher Demand and Shortage*
StLA State Library Agencies Survey*
STW school-to-work
TESOL Teachers of English to Speakers of Other Languages
TFS Teacher Follow-up Survey*
TIMSS Trends in International Mathematics and Science Study [this is the current title of TIMSS; in earlier reports, the 1995 study is referred to as the Third International Mathematics and Science Study, and the 1999 study is referred to as TIMSS-R (which stands for TIMSS-Repeat), but these terms are no longer used]
TRP Technical Review Panel
UNCF United Negro College Fund
WICHE Western Interstate Commission for Higher Education
WWC What Works Clearinghouse

Appendix B. Abbreviations List: States, the District of Columbia, Puerto Rico, Outlying Areas, and Freely Associated States

1. States, the District of Columbia, and Puerto Rico

Alabama	AL
Alaska	AK
Arizona	AZ
Arkansas	AR
California	CA
Colorado	CO
Connecticut	CT
Delaware	DE
District of Columbia	DC
Florida	FL
Georgia	GA
Hawaii	HI
Idaho	ID
Illinois	IL
Indiana	IN
Iowa	IA
Kansas	KS
Kentucky	KY
Louisiana	LA
Maine	ME
Maryland	MD
Massachusetts	MA
Michigan	MI
Minnesota	MN
Mississippi	MS
Missouri	MO
Montana	MT
Nebraska	NE
Nevada	NV
New Hampshire	NH
New Jersey	NJ
New Mexico	NM
New York	NY
North Carolina	NC
North Dakota	ND
Ohio	OH
Oklahoma	OK
Oregon	OR
Pennsylvania	PA
Puerto Rico (Commonwealth of)	PR
Rhode Island	RI
South Carolina	SC
South Dakota	SD
Tennessee	TN
Texas	TX
Utah	UT
Vermont	VT
Virginia	VA
Washington	WA
West Virginia	WV
Wisconsin	WI
Wyoming	WY

2. Outlying areas

American Samoa	AS
Guam	GU
Northern Mariana Islands (Commonwealth of the)	MP
U.S. Virgin Islands	VI

3. Freely associated states

Federated States of Micronesia	FM
Marshall Islands (Republic of the)	MH
Palau (Republic of)	PW

Note: If you refer collectively to some or all of the above jurisdictions in, for example, tables that include states, use the term "Other jurisdictions." Explain in a note what jurisdictions are included in the term, if you are not listing them separately.

These groupings (outlying areas and freely associated states) are listed in Part C—National Center for Education Statistics, within the Education Sciences Reform Act of 2002, which established the Institute of Education Sciences. (Since 1990, none of the entities listed above has been officially termed a *territory*.) Under section 158 of part C of the Act, the term *state* means each of the 50 states, the District of Columbia, and the Commonwealth of Puerto Rico.

(For those preparing maps that include abbreviations for Department of Defense schools, the official DoD titles and abbreviations for the separate overseas and domestic components of the DoD education system for dependents are as follows:

DoDDS — Department of Defense Dependents Schools [the overseas schools]
DDESS — Department of Defense Domestic Dependent Elementary and Secondary Schools [in the United States]

For additional guidance on the use—and avoidance—of abbreviations for DoD schools, see the "Department of Defense schools" subsection of Abbreviations and Acronyms in this style guide.)

Appendix C. Abbreviations List: Countries (Partial List) and Canadian Provinces and Territories

In text, avoid the use of abbreviations of the names of foreign countries and of Canadian provinces and territories. Avoid the use of these abbreviations in tables also, if possible. If it is necessary to use abbreviations in tables, define them in the table notes.

1. Countries

The following two-letter and three-letter abbreviations for countries and Hong Kong are from Codes for the Representation of Names of Countries (ISO 3166), prepared by the International Organization for Standardization and adopted in the United States as FIPS 104-1, American National Standard Codes for the Representation of Names of Countries, Dependencies, and Areas of Special Sovereignty for Information Interchange. The list shown below includes only countries that have participated in NCES surveys. To access ISO 3166 abbreviations for additional countries, go to http://www.odci.gov/cia/publications/factbook/appendix/appendix-d.html.

The Program for International Student Assessment (PISA) uses the three-letter abbreviations, which are often easier to understand than the shorter version. In the interest of standardization, if you find it necessary to use country abbreviations in tables and have not adopted the two-letter form, you are encouraged to use three-letter rather than two-letter abbreviations.

Country	Abbreviations	
Albania	ALB	AL
Argentina	ARG	AR
Australia	AUS	AU
Austria	AUT	AT
Belgium	BEL	BE
Bermuda	BMU	BM
Brazil	BRA	BR
Canada	CAN	CA
Chile	CHL	CL
China	CHN	CN
Czech Republic	CZE	CZ
Denmark	DNK	DK
Finland	FIN	FI
France	FRA	FR
Germany	DEU	DE

Country	Abbreviations	
Greece	GRC	GR
Hong Kong SAR[1]	HKG	HK
Hungary	HUN	HU
Iceland	ISL	IS
Indonesia	IDN	ID
Iran	IRN	IR
Ireland	IRL	IE
Israel	ISR	IL
Italy	ITA	IT
Japan	JPN	JP
Korea, Republic of	KOR	KR
Latvia	LVA	LV
Liechtenstein	LIE	LI
Lithuania	LTU	LT
Luxembourg	LUX	LU
Macao	MAC	MO
Macedonia, Republic of	MKD	MK
Mexico	MEX	MX
Netherlands	NLD	NL
New Zealand	NZL	NZ
Norway	NOR	NO
Peru	PER	PE
Poland	POL	PL
Portugal	PRT	PT
Romania	ROM	RO
Russian Federation	RUS	RU

[1]Hong Kong is a Special Administrative Region (SAR) of the People's Republic of China.

Country	Abbreviations	
Serbia and Montenegro (Yugoslavia)[2]	YUG	YU
Slovak Republic	SVK	SK
Spain	ESP	ES
Sweden	SWE	SE
Switzerland	CHE	CH
Thailand	THA	TH
Tunisia	TUN	TN
Turkey	TUR	TR
United Kingdom	GBR	GB
United States	USA	US
Uruguay	URY	UY

28. Canadian Provinces and Territories

AB	Alberta
BC	British Columbia
MB	Manitoba
NB	New Brunswick
NF	Newfoundland
NS	Nova Scotia
NT	Northwest Territories
NU	Nunavut
ON	Ontario
PE	Prince Edward Island
QC	Quebec
SK	Saskatchewan
YT	Yukon Territory

[2] Explain in your table notes if only the Serbia Republic participated in a survey.

Appendix D. Web Links to Standards, Style Manuals and Guidelines, and Dictionary

NCES Statistical Standards (NCES 2003–601)
http://nces.ed.gov/pubsearch/pubsinfo.asp?pubid=2003601

NCES Guidelines for Tabular Presentations (Appendix C of the *NCES Statistical Standards*)
http://nces.ed.gov/statprog/2002/appendixc.asp

NCES Style Guide
http://nces.ed.gov/statprog [click on *NCES Style Guide*]

United States Government Printing Office Style Manual
http://www.gpoaccess.gov/stylemanual/browse.html

Merriam-Webster Dictionary and Thesaurus
http://www.m-w.com

Publication Manual of the American Psychological Association [cannot browse the manual, but can access certain information such as style tips]
http://www.apastyle.org

The Chicago Manual of Style
http://www.chicagomanualofstyle.org [cannot browse the manual, but can access style tips]

Common Mistakes and Tricky Choices
http://englishplus.com/grammar/mistcont.htm

Appendix E. Microsoft Word Shortcuts and Tips

To access a range of Microsoft Word shortcut lists, do the following in Word:

1. Select Help.
2. In the menu that appears, click on Microsoft OfficeWord Help.
3. In the "Search for" window, space a couple of times, type "shortcut," and click on the search arrow (a list of shortcut topics appears).
4. To access a range of special-topic lists, choose "Keyboard shortcuts" and then select the list you want (selecting "Common tasks done in a Microsoft Word document" causes a list similar to the one shown below to appear).
5. Explore the other listings to find any kind of shortcut help you are seeking.

Quick reference to some common shortcut keys

Press	To
CTRL+SHIFT+SPACEBAR	Create a nonbreaking space
CTRL+SHIFT+HYPHEN	Create a nonbreaking hyphen
CTRL+B	Make letters bold (repeat to turn off bold)
CTRL+I	Make letters italic (repeat to turn off italic)
CTRL+U	Make letters underline (repeat to turn off underline)
CTRL+SHIFT+<	Decrease font size
CTRL+SHIFT+>	Increase font size
CTRL+SPACEBAR	Remove paragraph or character formatting
CTRL+C	Copy the selected text or object
CTRL+X	Cut the selected text or object
CTRL+V	Paste text or an object
CTRL+Z	Undo the last action
CTRL+Y	Redo the last action

Below are additional useful shortcuts:

To	Press
Obtain an em dash (—)	CTRL + ALT + minus key (on the numeric pad at far right)
Obtain an en dash (–)	CTRL + minus key (on the numeric pad at far right)
Obtain a † symbol	ALT + 0134 (on the numeric pad at far right)
Obtain a ‡ symbol	ALT + 0135 (on the numeric pad at far right)
Obtain a § symbol	ALT + 0167 (on the numeric pad at far right)

See the section of this style guide listed below	For how to
Numbers and Rounding	Change your default settings (e.g., "straight quotes" or "smart quotes"; on-the-line ordinals [1st] or superscript ordinals [1st])
Pagination	Suppress page numbers
Pagination	Change the style of page numbering
Parts of the Document	Create contents pages automatically

How to customize a tool bar

To add a command (for example, "Insert section break") to a tool bar (so you can simply click there whenever you want the command), do the following: right click in the tool bar and click on Customize; in the Customize box, select Commands and click on Insert (under Categories); in the list on the right (the Commands list), find the command you want; drag the command to the tool bar you want it on. If you want a button instead of words, click on Modify Selection (in the Customize box); select either Edit Button Image (which allows you to create your own button) or Change Button Image (which allows you to select among a few provided). If words as well as a button remain on your tool bar but you want a button only, click on Modify Selection again (in the Customize box) and select Default Style. (You will note that most items in the Commands list already have a button associated with them, so you do not usually have to select a button for commands in this list.)

How to use the Styles feature

Assign styles to different parts of your document

Use the Styles feature of Word to assign styles to different parts of your document. This feature allows you to automatically apply a desired set of formatting attributes (such as font, type size, alignment, indents, and spacing) to text, so that you do not have to manually format each part of your document. For example, to assign a style to a heading, select the heading level of interest from the pull-down window that appears at the top and to the left on your screen (in addition to heading styles, the pull-down window lists other styles, such as "Normal" and "Default Paragraph Font"). After selecting the heading level from the list, type your heading in your document; or, if you already have typed your heading, highlight it or put your curser in it and then select the desired heading level. The formatting of that heading level is automatically applied to your heading.

Do this to modify a style

Using Styles makes it easy to change formatting in your document. For example, if you decide to change the font and type size of one of your heading levels, you can simply modify the style for that heading level, instead of reformatting each of the individual headings.

To modify a style, select Format on your toolbar and click Style. In the Style box, select the style that you want to modify—e.g., Heading 2—and then click Modify. In the Modify Style box that appears, click Format at the bottom of the box, and then click the attribute (e.g., font) you want to change. Click OK after changing each attribute you wish to modify.

When you are done, click Apply. The modified formatting will be applied to all the text to which you have assigned that style.

In table and figure titles, efficient way to align runover lines with the first word of title

To efficiently align runover lines in titles (and ensure that you can easily produce lists of tables and figures automatically), use tabs as follows. (1) Press "Tab" after entering the identifier (e.g., after "Table 1."), and then enter the title. (2) Use a hanging indent as follows: highlight the identifier and title; select the "Format" drop-down menu on your toolbar and click on "Paragraph"; select "Indents and Spacing" at the top of the Paragraph box; under "Indentation," use the "Special:" drop-down menu to select "Hanging," and use the "By:" drop-down menu to enter the portion of an inch desired for indentation (including both the space for the figure/table identifier and the space between the identifier and the start of the title); then click "Ok." That will indent both the first word of the title and the first word of any runover line(s) by the specified measure, so that these first words align vertically.

You may wish to use the same hanging indent measure for tables 1-99; but it is likely that you will want to increase the measure to maintain a "reasonable" space following the identifier for tables 100+.

If you do use a different hanging indent measure for some of your table titles or some of your figure titles—and then automatically produce your list of tables or figures—you will need to do the following to align the first word of all titles in the list: highlight the list and reset the hanging indent (tab) measure to accommodate the largest indent (e.g., to accommodate table 100). The result will be a well-formatted list with all titles aligned.

For efficient production of table and figure titles in your document, you may assign a style—as described above in "How to use the Styles feature"—to each hanging indent measure used.

Appendix F. Selected Proofreading Marks

Marking for Basic Changes			
In margin	**In text**	**Meaning**	**Text example**
	∧	Insertion point corresponding to character(s) shown in margin	o one-half of public school teachers used cmputers for instruction ∧
	/ or —	Replace	c one-half of publik school ~~administrators~~ teachers used computers
⌒	⌒	Close up	⌒ one- half of public school teachers
ℸ	ℸ or ⌣	Delete	ℸ/ one-half of public schools teachers used ℸ/ ⌣ ~~used~~ computers
ⓓ	ⓓ	Delete and close up	the average scores for both maale and female students ⓓ
//		Slashes separate multiple marginal marks	ⓓ/ℸ/ⓤ booth males and Female students in the district
/		Slash draws attention to single marginal mark	freshmen who enrolled in remedial coarses u/
///		Repetition of slash indicates repetition of correction	m/// comunications between comunity and governent staff ∧ ∧ ∧
#	∧	Insert space	freshmen who enrolled inremedial courses #/ ∧
[Comments/ queries are circled]		Instructions, explanations, queries are circled to indicate that they are not to be set in type	about 20 percent of teachers in their first teaching job taught mathematics; about one-quarter taught English, reading, or writing; use percent both places for consistency ?

Marking for Punctuation			
In margin	**In text**	**Meaning**	**Text example**
⊙	∧	Insert period	⊙/ One million were employed in degree-granting institutions ∧
∧,	∧	Insert comma	∧, in Montana, Nevada ∧ and North Dakota
∧:	∧	Insert colon	∧: (BPS ∧ 96/01)
∧;	∧	Insert semicolon	∧; the proportion increased between 1975 and 2000 ∧ however, there still
?/ question mark	∧	Set question mark	How many jobs do you have now ∧ ?/ question mark
“/ ”/	“/ ”/	Quote marks	“/ / ”/ the CCD “/ Local Education Agency Universe Survey ”/
1/M	1/M	Em dash	1.51 credits 1/M the equivalent of
=/ hyphen	∧	Hyphen	all coursework at public 2 ∧ year colleges =/ hyphen
=/ equals sign	∧	Set equals sign	4 percent of all schools (N ∧ 1,023 schools) =/ equals sign
∨	∨	Set superscript	education courses.4 ∨ This measure ∨4/
∧	∧	Set subscript	∧1/∧2 where E ∧1 and E ∧2 are the estimates to be compared

Marking for Font and Case			
In margin	**In text**	**Meaning**	**Text example**
rom		Set in roman	(DeVoe et al. 2003) rom
ital		Set in italics	Indicators of School Crime and Safety: 2003 ital
bf or bold		Set in boldface	bf Electronic services Twenty-five libraries reported that
lc		Set in lowercase	lc The 100 largest School Districts
caps or all caps		Set in all capitals	caps naep
c c D		Initial letter caps	c c D common core of data
clc		Set in capitals and lowercase	clc INSTITUTE OF EDUCATION SCIENCES
c + sc		Set in capitals and small capitals	c + sc (a) Biennial Report. Each state education agency
wf		Wrong font	1.51 credits—the equivalent of wf

Marking to Adjust Placement and Position			
In margin	**In text**	**Meaning**	**Text example**
tr		Transpose	tr Bureau Indian of Affairs
		Move right	Bureau of Indian Affairs
		Move left	Bureau of Indian Affairs
		Move up	IPEDS
		Move down	IPEDS
align		Align vertically	align **Electronic services** Twenty-five libraries reported that they were open 168 hours.
eq#	✓✓✓	Equalize space where indicated	eq# Twenty-five ✓ libraries ✓ reported ✓ that
break		Break line where indicated	Twenty-five libraries reported that they were open 168 hours. break
run up or run back		Carry back to previous line	run up Twenty-five libraries reported that they were open 168 hours.
¶	∧	New paragraph	¶ One million were employed in degree-granting institutions. ∧ Considering only Title IV

Miscellaneous Marks			
In margin	**In text**	**Meaning**	**Text example**
stet	.....	Let it stand (ignore change to portion of text indicated by dots)	when the report was signed off ~~on~~ is relevant stet/
sp	◯	Spell out	sp/ 25 libraries reported that they were open 168 hours.

NOTE: Traditionally, proofreaders write the "in margin" marks in both the left and right margins, as shown below. However, depending on such factors as the materials reviewed and the purpose of the review, the person proofreading or editing your work may write the "in margin" marks only in the margins, only within the text, or in both places.

r/ ◯/	Each in-text marke is pai red with a corresponding marginal mark.	r/
lc/	An imaginary line halves The print area vertically. Marginal marks	
r/	for the left half area ordered left to wright in the left half's margn.	r/i
	Marginal marks for the right half are ordered left to right in the right	
i/r/	half's margin. Multiple margnal marks are separated by slashes.	delete as redundant ?
	Marginal marks are ordered left to right.	

Appendix G. Guidance for Producing Figures in Excel That Meet NCES Standards

This appendix is meant to serve as a guide for anyone preparing figures for NCES reports in Microsoft Excel. The first pages of this appendix provide a quick overview of the basic elements in most NCES figures and an explanation of how to add a chart with NCES formatting to your Excel program's choice of Chart Types. The next section provides a guide for selecting colors and line styles for printing figures that require multiple colors or line styles. The subsequent pages demonstrate what Excel's default settings produce for seven basic chart types and what NCES standards for these figures require. Each chart type is accompanied by a list of the modifications needed to make the default example meet NCES standards (and how to do the most complicated modifications in Excel). This guide assumes a working knowledge of Excel and does not explain every step involved in creating figures. For basic information, refer to an Excel user's guide.

Note re nonprint media : In preparing and displaying figures, nonprint media should follow the recommendations of this style guide as far as is practicable. For additional guidance in this area, see the NCES web standards. Ensure that nonprint media comply with Section 508 accessibility requirements for people with disabilities. (Section 508 of the Rehabilitation Act of 1973 was reauthorized by the Workforce Investment Act of August 1998; standards for accessible technology were issued in December 2000 by the U.S. Access Board, an independent federal agency.)

All figures need the following elements:

1. Title

   Rules for figure titles are the same as those for table titles. For these rules refer to the Style Guide under Figures and to the *NCES Statistical Standards* , appendix C (NCES Guidelines for Tabular Presentations). Also refer to appendix H of this style guide.

   In particular note that titles need

   (a) a hanging indent inserted if the title runs more than one line and there is a figure identifier (e.g., Figure 2);

   (b) capitalization of only the first word of the title and subtitle (which follows a colon and indicates where or the time frame, or both) and any proper nouns (e.g., Percentage of foreign students studying in the United States: Various years, 1990-2003); and

   (c) the elements describing how the data are classified (e.g., by control of school, age, and sex of students) in the same order as labeled in the chart area and in the legend.

2. Labeled axes

   All axes need to be labeled horizontally, with the same capitalization rule that applies to titles.

   If there is not room on the x axis for all labels to fit without overlapping, remove every other one (when possible), and lengthen the tick marks for the remaining labels. When this is not possible (such as in the case of categorical labels), put every other label at a lower level than the others, to retain all labels while keeping the text running horizontal. (*But* see "6. Tick marks" below regarding year labels.)

3. Proper scaling

   All figures with comparable units must use the same scale throughout a report (e.g., 0-10 should be approximately the same size in all comparable figures). Also, scales showing comparable units should use the same scale increments (e.g., 10 percent increments in all rather than 10 percent in some and 5 percent in others).

   To get figures to print with consistent scales in Excel (or after being inserted into a Word document), you need to create an object (e.g., a text box) the same height as you want your y axis to be in all your figures. Then you need to size each figure manually by dragging and eyeballing the chart size. There is no way to set the size automatically. Also, it is not always possible to make the y axis in all figures the same height because objects in Excel figures cannot be offset from Excel's underlying grid.

   Except in time-series figures, all figures should have continuous scales starting at 0 or the minimum value on the scale. If a scale break is used, it should be clearly marked (usually with a pair of diagonal lines or a squiggly line).

4. Legends or labeled data

   All figures must have either a legend (presenting a key to the colors and line styles used to distinguish data) or labels next to each data line or data area. The text for legends and labels should run horizontally. When possible, use labels instead of a legend.

5. Source

   All figures must properly identify the source of the displayed data. For rules on how to present sources, refer to the Survey Titles section of this style guide, standard 5-4-5, and p. 187 of appendix C of the *NCES Statistical Standards.*

Some figures may also need the following:

6. Tick marks

   If tick marks are needed, place them outside the axis. On the horizontal (x) axis, include a tick mark for every point for which you have data; omit tick marks where you do not have data. Center scale numbers on the tick marks they identify. If your data points are not at equal intervals of time (e.g., you have data for 1992, 1994, and 1998), place your axis labels at proportional intervals (i.e., show twice as much space between 1994 and 1998 as between 1992 and 1994). Label only the years with data points; but if there are too many to keep the labels horizontal, use tick marks without labels for intervening data points. (See "2. Labeled axes" above regarding other types of data labels.)

7. Notes

   For a guide to preparing a general note, refer to the Tables section of this style guide and to appendix C of the *NCES Statistical Standards,* p. 186.

8. Reference notes

   For a guide to inserting reference (numbered) notes, refer to the Tables section of this style guide and to appendix C of the *NCES Statistical Standards,* p. 186.

9. Special notes
   For a guide to inserting special (symbol) notes, refer to the Tables section of the style guide and to appendix C of the *NCES Statistical Standards,* p. 185.

10. Multiple colors and line styles for readers to distinguish data lines, bars, or areas
    For guidance on selecting colors and line styles, see the Color and Line Guide on the next page.

Adding a chart with custom formatting to your Excel program's choice of Chart Types

Excel's Chart Wizard, which you use to create charts, allows you to choose the type of chart you would like to create from two lists of chart types: Standard Types and Custom Types. When you select one of the preset chart types from either of these lists, Excel automatically creates a chart with its default settings for the background color, borders, font size, style of gridlines and data labels, etc. Many of these default settings need to be changed to create a chart that conforms with NCES standards. The rest of this appendix describes how to make these changes manually. However, if you are creating many charts that are the same or quite similar, you may want Excel to remember all the manual changes you make to your first chart's settings so that they can be applied to all the other new charts you will create.

To have Excel remember the settings from a chart you have made or from a chart you have downloaded, right-click anywhere on the chart area and select **Chart Type**. Then click on the tab labeled "Custom Types," go to "Select from" in the bottom left, and select "User-defined." This will bring up a list of chart types that includes Excel's default. It will also make a button labeled "Add" appear at the bottom of the dialog box. Click on the Add button. Excel will prompt you to enter in a name for your chart type settings. Enter a descriptive name (e.g., Standard NCES bar graph), not something that will be hard to interpret months later (e.g., Tom's settings). After you click OK, your new chart type will appear in the list of user-defined custom chart types. You can then select your custom chart type whenever you want to create a new chart with your saved settings or whenever you want to apply those saved settings to a previously made chart.

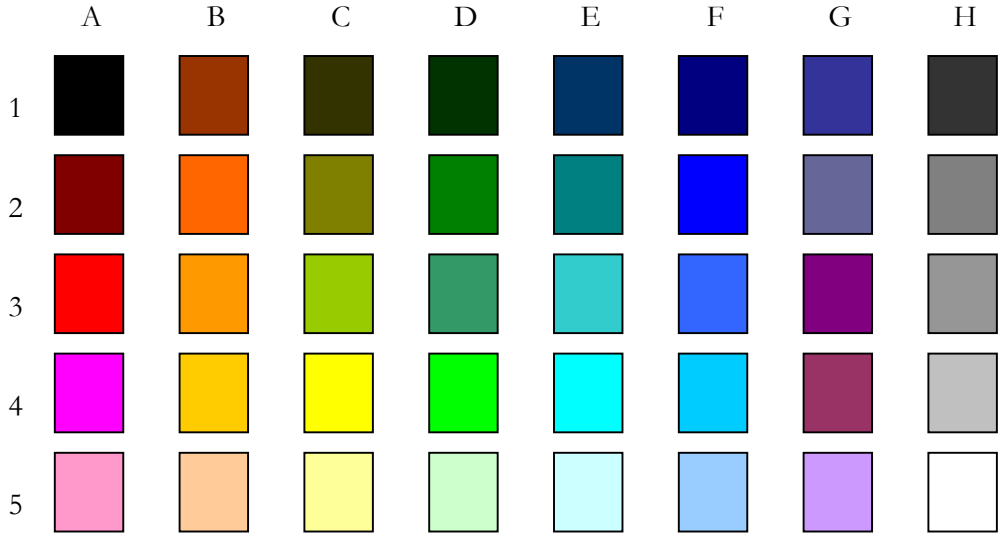
If you often create charts like those that appear in this appendix, you can download this appendix as an Excel file by clicking on this link [http://nces.ed.gov/statprog/styleguide/excel/appendixG.xls] and add each of the correctly formatted chart types in this appendix as a user-defined custom chart type in your version of Excel.

Color and Line Guide

Files prepared in Microsoft Excel or Word must be converted to PDF for posting on the NCES website and, in most cases, to be sent to GPO for publication. They also must use only black, white, and gray for the final product because Microsoft software does not use the same color system that is used in offset (GPO) printing. The following pages suggest "color" and graphic pattern combinations that can be used to create figures that both (a) reproduce consistently and clearly in black and white photocopies and (b) should hold up when converted into PDFs that can be sent to GPO for publication. However, these are not required color or graphic pattern combinations.

To distinguish among colors, the Standard Microsoft Color Palette is presented below with each column identified by a letter and each row numbered. Printing out this page on a regular black and white printer will provide you with a guide to how these colors print as gray tones. However, products to be converted into PDF and sent to GPO for publications should use only black (A1) and the shades of gray in column H. (Reports with figures in color need to have their figures prepared in professional publishing software.)

Standard Microsoft Excel Color Palette



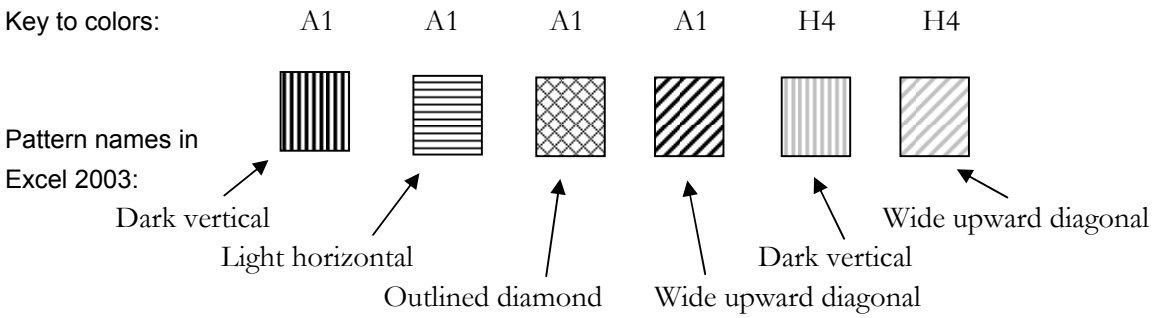
Suggested color combinations for bar and area charts that need two or three colors:

two colors three colors

For bar and area charts that need more than three colors, repeat these color combinations with an overlaid graphic pattern. Be sure that throughout a single report, the same color and graphic pattern is always used for the same category (e.g., female, Asian, 4-year degree-granting institution, etc.).

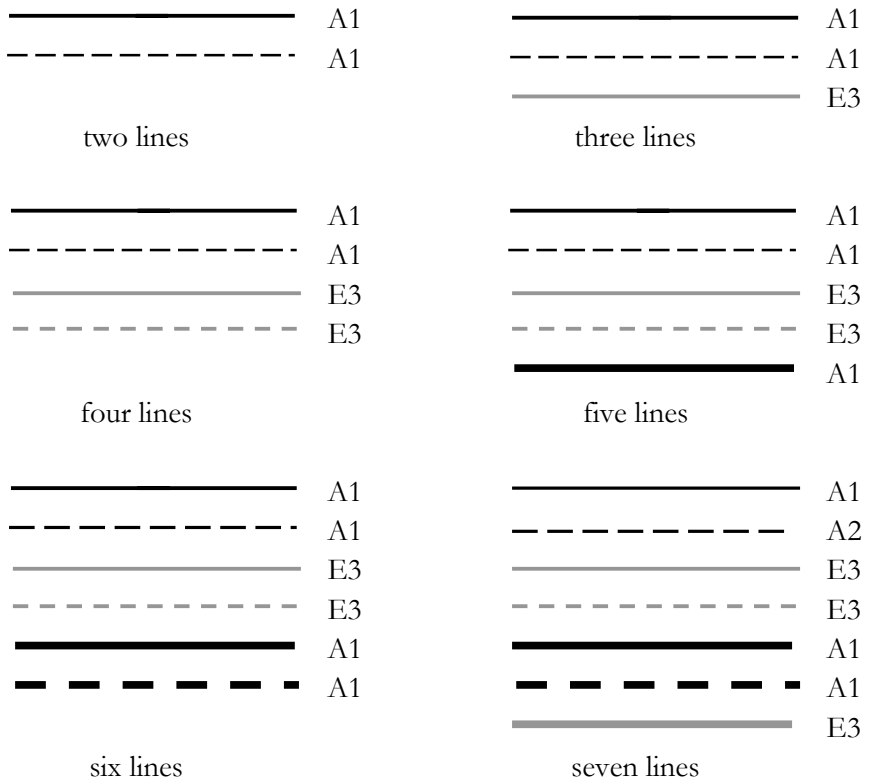
Color and Line Guide–Continued

The following are some possible color and graphic patterns; however, reports may use different color and graphic combinations. Whatever colors and graphic patterns are used, authors should check the reproducible consistency and clarity of every report's figures both in terms of photocopying and PDF conversion.

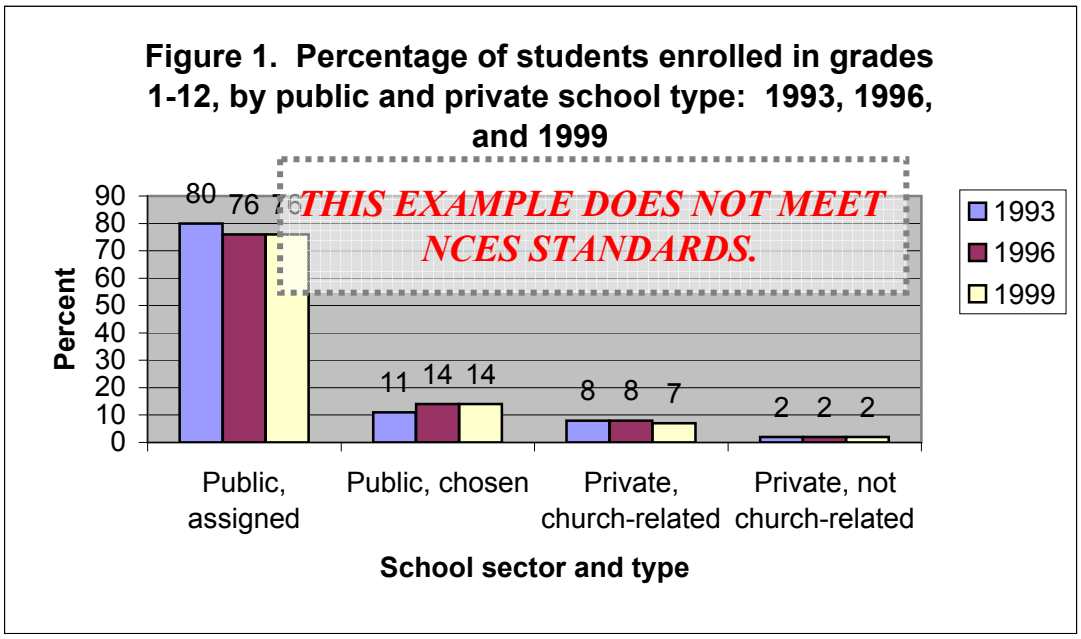


These graphic patterns can be applied when you select an area's color by clicking on the "Fill Effects" button below the Color Palette, then click on the "Pattern" tab, and select the pattern you want. Note that you can change the default foreground and background color for each pattern.

Suggested colors and line styles for line charts that need



Excel default settings for figure:

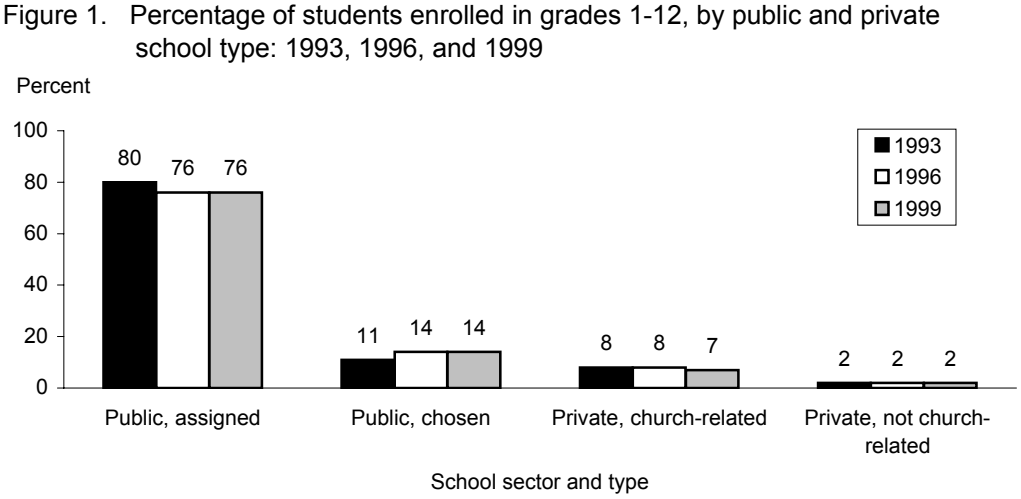


NOTE: Includes homeschooled students enrolled in public or private schools for 9 or more hours per week. Detail may not sum to totals because of rounding.

SOURCE: U.S. Department of Education, National Center for Education Statistics, School Readiness Survey of the 1993 National Household Education Surveys Program (SR-NHES:1993); School Safety and Discipline Survey of the 1993 National Household Education Surveys Program (SS&D-NHES:1993); Parent and Family Involvement in Education/Civic Involvement Survey of the 1996 National Household Education Surveys Program (PFI/CI-NHES:1996); and Parent Survey of the 1999 National Household Education Surveys Program (Parent-NHES:1999).

Default Settings

Excel figure with manual formatting to meet NCES standards:



NOTE: Includes homeschooled students enrolled in public or private schools for 9 or more hours per week. Detail may not sum to totals because of rounding.

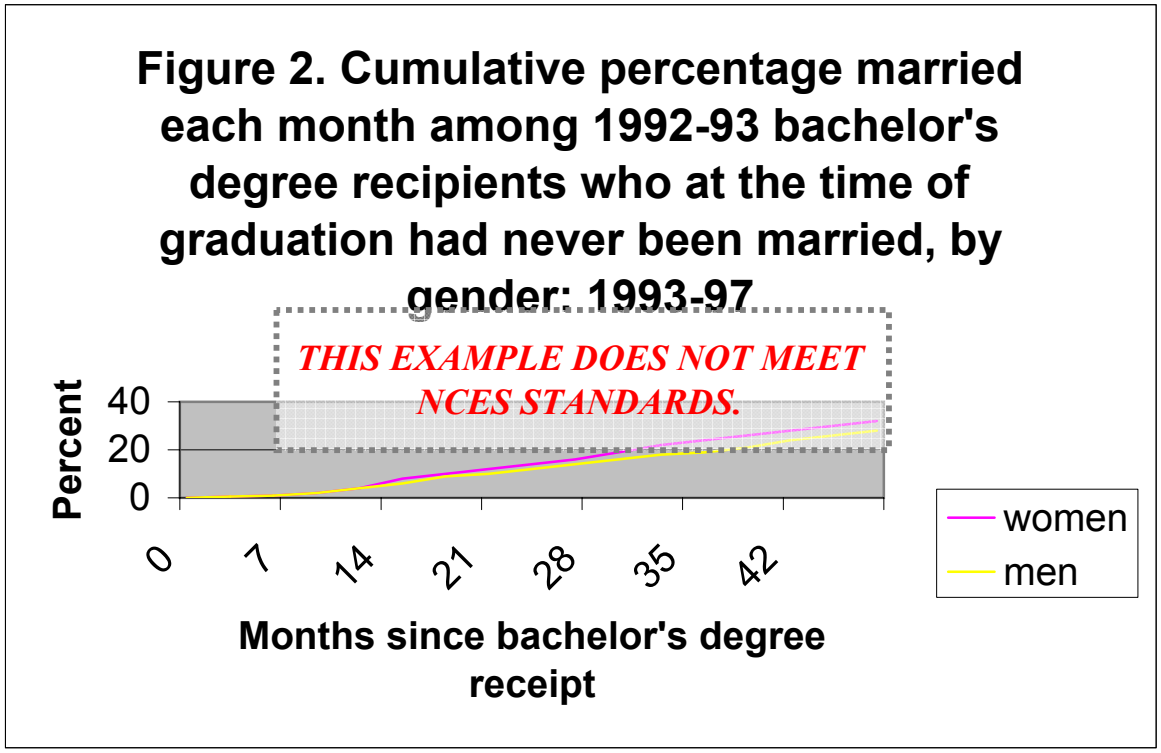
SOURCE: U.S. Department of Education, National Center for Education Statistics, School Readiness Survey of the 1993 National Household Education Surveys Program (SR-NHES:1993); School Safety and Discipline Survey of the 1993 National Household Education Surveys Program (SS&D-NHES:1993); Parent and Family Involvement in Education/Civic Involvement Survey of the 1996 National Household Education Surveys Program (PFI/CI-NHES:1996); and Parent Survey of the 1999 National Household Education Surveys Program (Parent-NHES:1999).

Formatted Correctly

Manual formatting steps for figure 1 (bar chart):

1. Enter the title either into a text box or into a merged cell across the top of the chart so that the title can be stretched across the figure precisely (otherwise the title's width on the page and the number of characters in the title may be arbitrarily constrained). Text boxes can be made by clicking on the text box icon in the Drawing toolbar and dragging your activated cursor to the desired size. If necessary, set the text box's background fill color to white and make sure it has no border (right-click on the text box so the **Format Text Box** dialog box comes up and, under the **Colors and Lines** tab, set the Color under Fill to white and under Line to "No Line"). For guidance on creating hanging indents in titles, see appendix H, guideline C.
2. Rescale the *y* axis (vertical axis) to 100 (right-click on *y* axis, **Format Axis**, under **Scale** set **Maximum** and **Minimum** appropriately).
3. Transform the *y* axis label to read horizontally (right-click on the label, **Format Axis Title**, under **Alignment** set the **Orientation** to 0 degrees), take off bold, and place at the top of the axis.
4. Turn off the background border and color (right-click inside the graph, **Format Plot Area**, under **Patterns** set both **Border** and **Background** to none).
5. Turn off the background grid lines (right-click inside the graph, **Chart Options**, under **Gridlines** deselect any marked boxes).
6. Turn off the box around the figure (right-click along the edge of the figure, **Format Chart Area**, under **Patterns** set **Border** to none).
7. Set all the fonts to the same size except the title (which should be slightly larger) (right-click along the edge of the figure, **Format Chart Area**, under **Font** set **Size** accordingly; then right-click on title text box, **Format Text Box**, under **Font** set **Size** slightly larger than that used in the rest of the chart).
8. Delete the tick marks on the *x* axis (right-click on the *x* axis, **Format Axis**, under **Patterns** make sure the **Major tick mark type** and **Minor tick mark type** are both set to none).
9. Resize the figure so it is proportionately sized (right-click inside the graph, click and drag any of the corner boxes to resize the chart area), and place the legend so it is easier to read. Note that by dragging the corners of the legend you can expand it vertically or horizontally and the contents will adjust accordingly to the space available.
10. Adjust the color of the bars (right-click on each bar one at a time, **Format Data Series**, under **Patterns** set the **Area** color selection as desired.) For help with color choices, refer to the Color and Line Guide in this appendix.

Excel default settings for figure:



SOURCE: U.S. Department of Education, National Center for Education Statistics, 1993 Baccalaureate and Beyond Longitudinal Study, "Second Follow-up" (B&B:93/97), Data Analysis System.

Default Settings

Excel figure with manual formatting to meet NCES standards:

Figure 2. Cumulative percentage married each month among 1992-93 bachelor's degree recipients who at the time of graduation had never been married, by gender: 1993-97

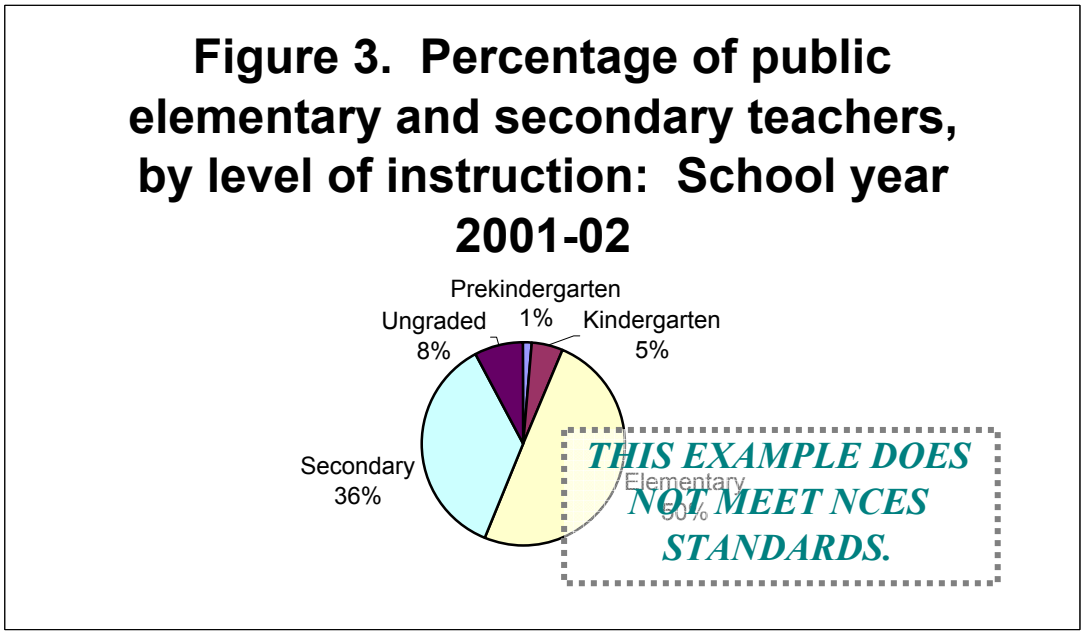
SOURCE: U.S. Department of Education, National Center for Education Statistics, 1993 Baccalaureate and Beyond Longitudinal Study, "Second Follow-up" (B&B:93/97), Data Analysis System.

Formatted Correctly

Manual formatting steps for figure 2 (simple line chart):

1. Enter the title either into a text box or into a merged cell across the top of the chart so that the title can be stretched across the figure precisely (otherwise the title's width on the page and the number of characters in the title may be arbitrarily constrained). Text boxes can be made by clicking on the text box icon in the Drawing toolbar and dragging your activated cursor to the desired size. If necessary, set the text box's background fill color to white and make sure it has no border (right-click on the text box so the **Format Text Box** dialog box comes up and, under the **Colors and Lines** tab, set the Color under Fill to white and under Line to "No Line"). For guidance on creating hanging indents in titles, see appendix H, guideline C.
2. Rescale the y axis to 100 (right-click on y axis, **Format Axis**, under **Scale** set **Maximum** and **Minimum** appropriately).
3. Enter the y axis title and the x axis title into separate text boxes (see step 1 on how to create text boxes); size the x and y axis titles correctly; place the y axis title at the top of the y axis; and center the x axis title below the x axis.
4. Turn off the box around the graph and the background color (right-click inside the graph, **Format Plot Area**, under **Patterns** set **Border** and **Background** both to none).
5. Change the background gridlines (right-click on any gridline, **Format Gridlines**, under **Patterns** select appropriate choices).
6. Turn off the box around the figure (right-click along the edge of the figure, **Format Chart Area**, under **Patterns** set **Border** to none).
7. Set all the fonts to the same size except the title (which should be slightly larger) (right-click along the edge of the figure, **Format Chart Area**, under **Font** set **Size** accordingly; then right-click on title text box, **Format Text Box**, under **Font** set **Size** slightly larger than that used in the rest of the chart).
8. Resize the figure so it is proportionately sized (right-click inside the graph, click and drag any of the corner boxes to resize the chart area).
9. Delete the legend and place text boxes with the labels next to the data lines.
10. Create text boxes for the x axis labels (see step 1 on how to create text boxes) so the labels can be centered (manually) on the major tick marks. (Excel by default places x axis value labels flush left with the major tick marks.) Note that after you have positioned the labels where they appear to be centered, you need to check the Print Preview to see how they will print. Text boxes often print differently than they appear on screen; fussing is usually required to get them positioned correctly.
11. Adjust the color, style, and width of the data lines so they contrast clearly (right-click on each data line, **Format Data Series**, under **Patterns** adjust accordingly). For help with color choices, refer to the Color and Line Guide in this appendix.

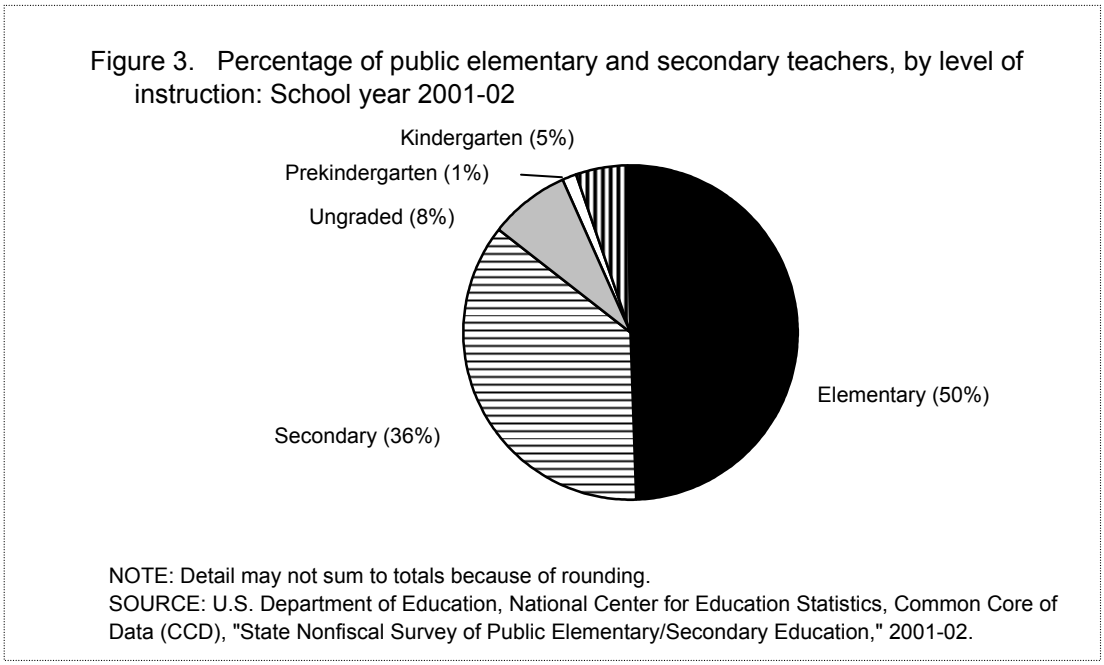
Excel default settings for figure:



NOTE: Detail may not sum to totals because of rounding.
SOURCE: U.S. Department of Education, National Center for Education Statistics, Common Core of Data (CCD), "State Nonfiscal Survey of Public Elementary/Secondary Education," 2001-02.

Default Settings

Excel figure with manual formatting to meet NCES standards:



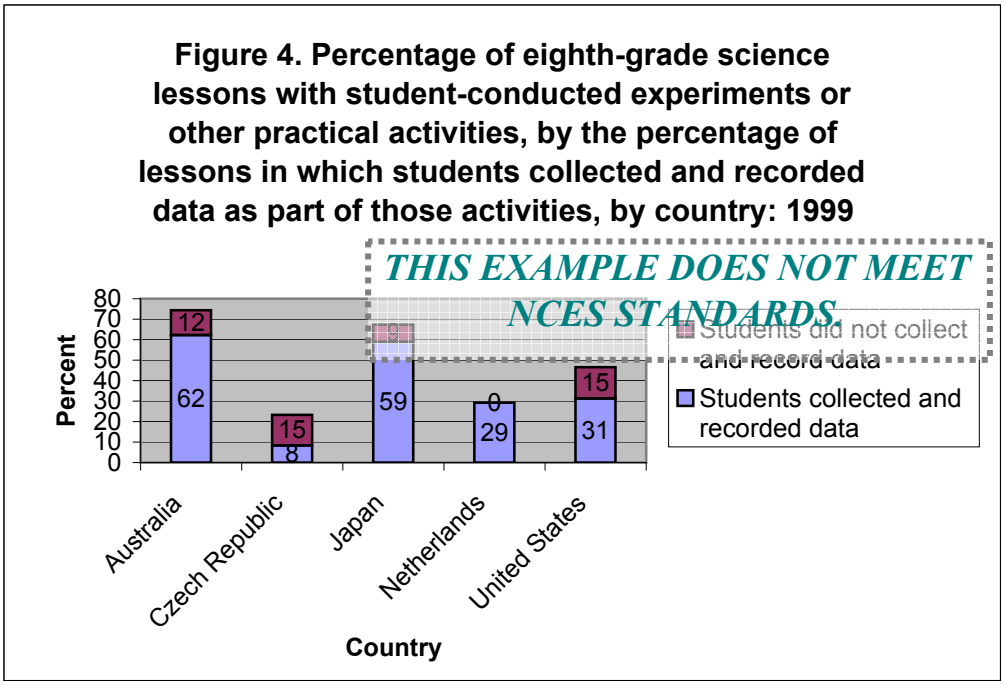
NOTE: Detail may not sum to totals because of rounding.
SOURCE: U.S. Department of Education, National Center for Education Statistics, Common Core of Data (CCD), "State Nonfiscal Survey of Public Elementary/Secondary Education," 2001-02.

Formatted Correctly

Manual formatting steps for figure 3 (pie chart):

1. Enter the title either into a text box or into a merged cell across the top of the chart so that the title can be stretched across the figure precisely (otherwise the title's width on the page and the number of characters in the title may be arbitrarily constrained). Text boxes can be made by clicking on the text box icon in the Drawing toolbar and dragging your activated cursor to the desired size. If necessary, set the text box's background fill color to white and make sure it has no border (right-click on the text box so the **Format Text Box** dialog box comes up and, under the **Colors and Lines** tab, set the Color under Fill to white and under Line to "No Line"). For guidance on creating hanging indents in titles, see appendix H, guideline C.
2. If you need percentages rounded to one decimal place or placed in parentheses (or both), turn off the automatic data labels so the percentages can be inserted along with the labels in text boxes (right-click next to chart, **Chart Options**, under **Data Labels** deselect all options under "Label Contains"). Insert each label and its corresponding percentage in a text box to round to the first decimal place.
3. Set all the fonts to the same size except the title (which should be slightly larger) (right-click along the edge of the figure, **Format Chart Area**, under **Font** set **Size** accordingly; then right-click on title text box, **Format Text Box**, under **Font** set **Size** slightly larger than that used in the rest of the chart).
4. Resize the figure so it is proportionately sized (right-click inside the graph, click and drag any of the corner boxes to resize the chart area) and center it (left-click in the plot area and drag the graph to the center).
5. Insert a small line to connect the Prekindergarten label with its pie "piece." (Note that Excel by default draws lines, but it chooses to draw in different lines than may make the most sense. This feature was turned off in step 2 when all data label options were deselected. However, if you want to keep the automatic labels but not the default "leader" lines, they can be turned off by right-clicking next to the chart, **Chart Options**, under **Data Labels** deselect show leader lines.)
6. Adjust the color of the pie "pieces" so they contrast clearly (right-click on each piece, **Format Data Point**, under **Patterns** adjust in accordance with the Color and Line Guide).
7. Rotate the entire pie chart to the orientation that seems best, with a dividing line between wedges at 12 o'clock (right-click on the pie, **Format Data Series**, under **Options** adjust the **Angle of first slice** accordingly).

Excel default settings for figure:

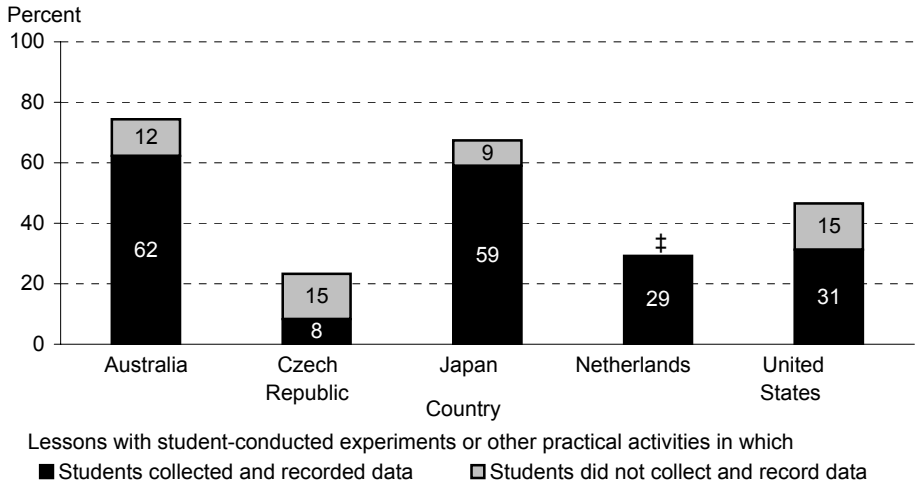


SOURCE: *Teaching Science in Five Countries: Results from the TIMSS 1999 Video Study* (NCES 2004-015), figure 6.20. Data from U.S. Department of Education, National Center for Education Stastistics, Third International Mathematics and Science Study (TIMSS) Video Study, 1999.

Default Settings

Excel figure with manual formatting to meet NCES standards:

Figure 4. Percentage of eighth-grade science lessons with student-conducted experiments or other practical activities, by the percentage of lessons in which students collected and recorded data as part of those activities, by country: 1999



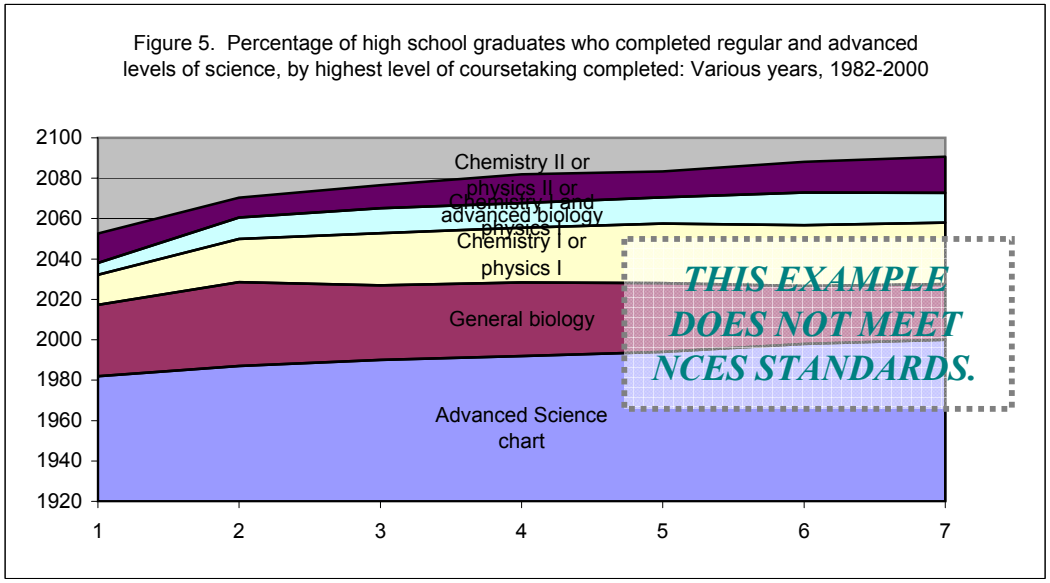
‡ Reporting standards not met.
SOURCE: *Teaching Science in Five Countries: Results from the TIMSS 1999 Video Study* (NCES 2004-015), figure 6.20. Data from U.S. Department of Education, National Center for Education Stastistics, Third International Mathematics and Science Study (TIMSS) Video Study, 1999.

Formatted Correctly

Manual formatting steps for figure 4 (stacked bar chart):

1. Enter the title either into a text box or into a merged cell across the top of the chart so that the title can be stretched across the figure precisely (otherwise the title's width on the page and the number of characters in the title may be arbitrarily constrained). Text boxes can be made by clicking on the text box icon in the Drawing toolbar and dragging your activated cursor to the desired size. If necessary, set the text box's background fill color to white and make sure it has no border (right-click on the text box so the **Format Text Box** dialog box comes up and, under the **Colors and Lines** tab, set the Color under Fill to white and under Line to "No Line"). For guidance on creating hanging indents in titles, see appendix H, guideline C.
2. Rescale the *y* axis to 100 (right-click on *y* axis, **Format Axis**, under **Scale** set **Maximum** and **Minimum** appropriately).
3. Transform the *y* axis title to read horizontally (right-click on the label, **Format Axis Title**, under **Alignment** set the **Orientation** to 0 degrees); transform the *x* axis labels to read horizontally (right-click on the *x* axis, **Format Axis**, under **Alignment** set the **Orientation** to 0 degrees); take off bold and size the *x* and *y* axis titles correctly; place the *y* axis title at the top of the *y* axis; and center the *x* axis title below the *x* axis.
4. Turn off the box around the graph and the background color (right-click inside the graph, **Format Plot Area**, under **Patterns** set **Border** and **Background** both to none).
5. Change the background gridlines (right-click on any gridline, **Format Gridlines**, under **Patterns** select appropriate choices).
6. Turn off the box around the figure (right-click along the edge of the figure, **Format Chart Area**, under **Patterns** set **Border** to none).
7. Set all the fonts to the same size except the title (which should be slightly larger) (right-click along the edge of the figure, **Format Chart Area**, under **Font** set **Size** accordingly; then right-click on title text box, **Format Text Box**, under **Font** set **Size** slightly larger than that used in the rest of the chart).
8. Resize the figure so it is proportionately sized (right-click inside the graph, click and drag any of the corner boxes to resize the chart area).
9. Adjust the color, style, and width of the bars so they contrast clearly (right-click on each data line, **Format Data Series**, under **Patterns** adjust accordingly). For help with color choices, refer to the Color and Line Guide in this appendix.
10. Insert the "‡" symbol in a text box above Netherlands' bar to explain why there are no data reported. (See step 1 on how to create a text box.) Select and delete the original data label of "0" if need be. *Make sure there is a special note for the symbol placed before the SOURCE.*
11. Insert "Lessons with student-conducted experiments or other practical activities in which" in a text box above the legend for clarity. (See step 1 on how to create a text box.)
12. Delete the tick marks on the *x* axis (right-click on the *x* axis, **Format Axis**, under **Patterns** make sure the **Major tick mark type** and **Minor tick mark type** are both set to none).

Excel default settings for figure after setting font size:

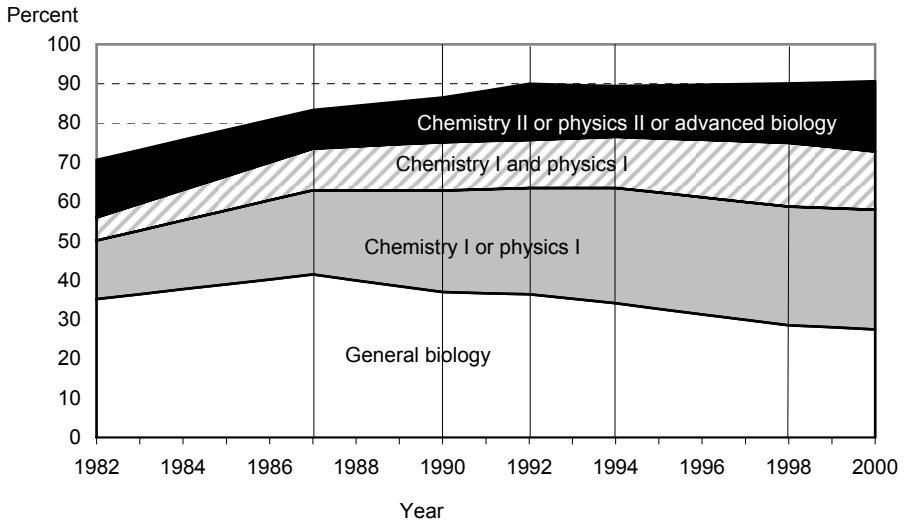


SOURCE: U.S. Department of Education, National Center for Education Statistics, High School and Beyond Longitudinal Study of 1980 Sophomores, "First Follow-up" (HS&B-So:80/82); National Education Longitudinal Study of 1988 (NELS:88/92), "Second Follow-up, High School Transcript Survey, 1992"; National Assessment of Educational Progress (NAEP), 1987, 1990, 1994, 1998; and 2000 High School Transcript Study (HSTS).

Default Settings

Excel figure with manual formatting to meet NCES standards:

Figure 5. Percentage of high school graduates who completed regular and advanced levels of science, by highest level of coursetaking completed: Various years, 1982-2000



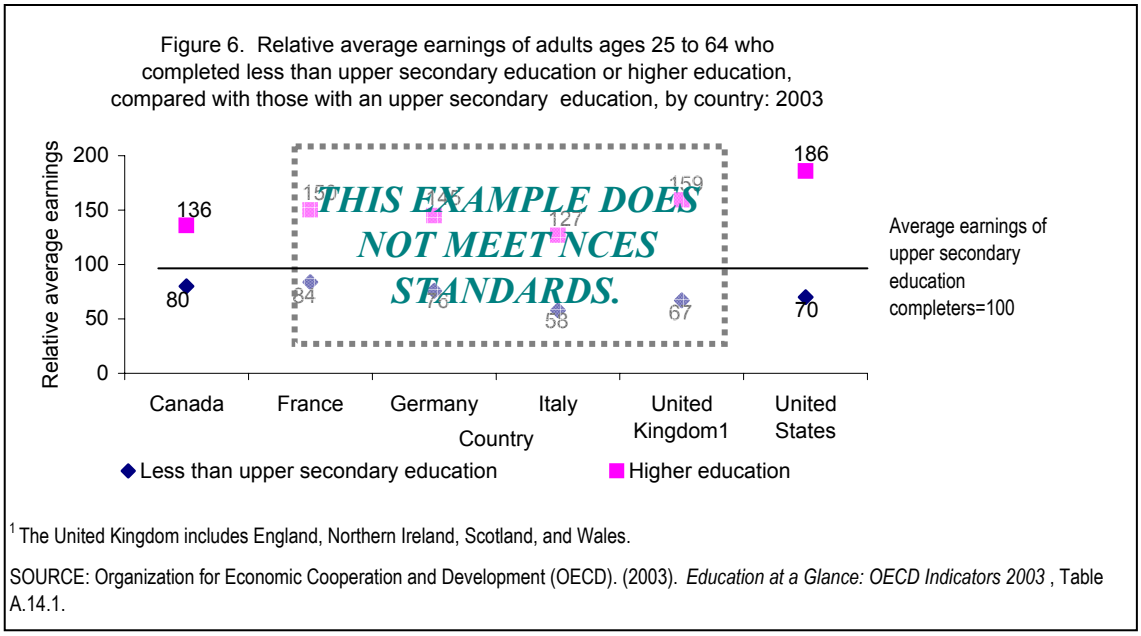
SOURCE: U.S. Department of Education, National Center for Education Statistics, High School and Beyond Longitudinal Study of 1980 Sophomores, "First Follow-up" (HS&B-So:80/82); National Education Longitudinal Study of 1988 (NELS:88/92), "Second Follow-up, High School Transcript Survey, 1992"; National Assessment of Educational Progress (NAEP), 1987, 1990, 1994, 1998; and 2000 High School Transcript Study (HSTS).

Formatted Correctly

Manual formatting steps for figure 5 (stacked area chart):

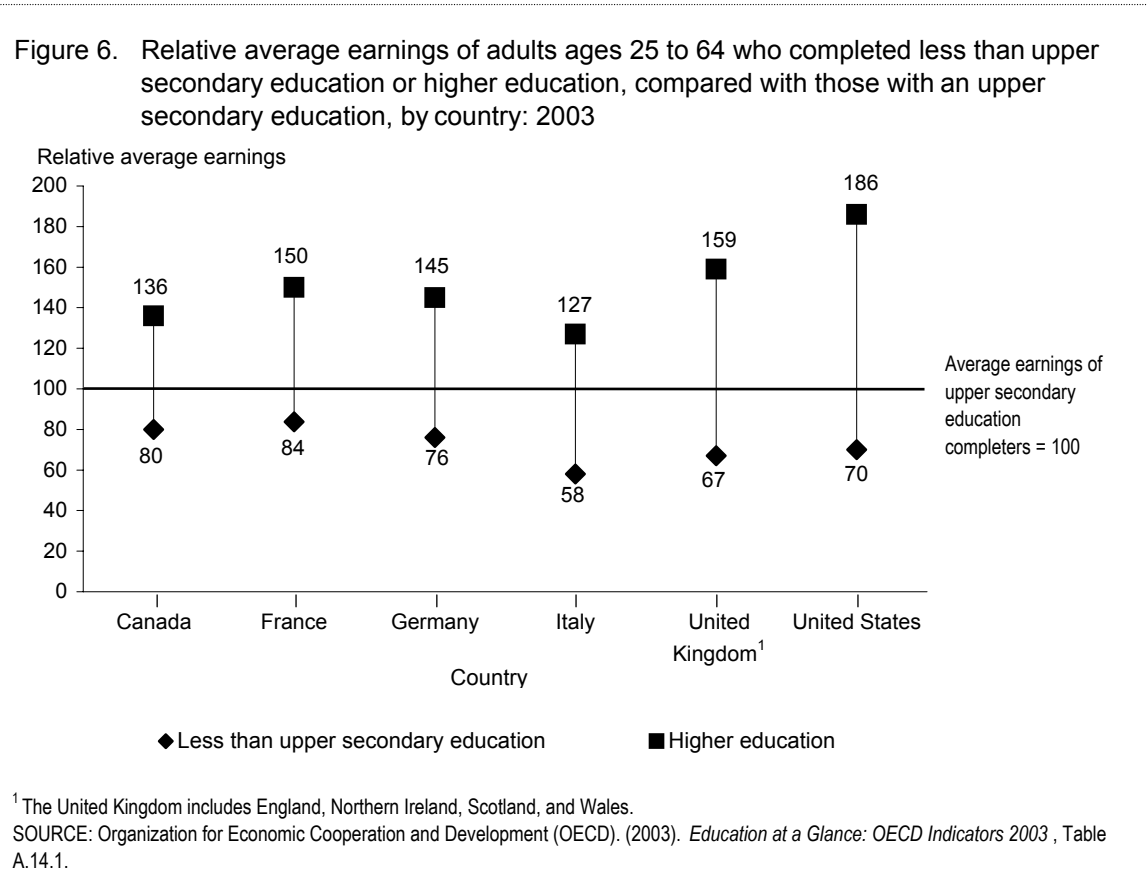
1. Enter the title either into a text box or into a merged cell across the top of the chart so that the title can be stretched across the figure precisely (otherwise the title's width on the page and the number of characters in the title may be arbitrarily constrained). Text boxes can be made by clicking on the text box icon in the Drawing toolbar and dragging your activated cursor to the desired size. If necessary, set the text box's background fill color to white and make sure it has no border (right-click on the text box so the **Format Text Box** dialog box comes up and, under the **Colors and Lines** tab, set the Color under Fill to white and under Line to "No Line"). For guidance on creating hanging indents in titles, see appendix H, guideline C.
2. Delete the category "Advanced Science Chart" (right-click on chart, **Source Data**, **Series,** select category and click remove) and set the *x* axis labels to report years (not a category number) (under **Source Data**, in the box to the right of "Category (X) axis labels" enter the correct range for the *x* axis labels—i.e., the cell range for the years).
3. Correct the improper spacing on the *x* axis between years by inserting a column in the source data field for each missing year and entering the following formula in each cell between columns with data: (value for year A) + (inserted year – year A) * [(value for year B) – (value for year A)]/year B – year A]. Note that the "inserted year – year A" equals 1 in the first inserted column, 2 in the next, etc. The denominator, year B – year A, is the number of years between year A and year B. (*If you download the electronic version of this appendix, you can see the sample source data field above, starting in cell Y32. The link to download this appendix is on page G-3 of the introduction.*)
4. Correct the overlapping and bunched up data labels in the chart by copying and pasting the data labels that are too long to fit on a single line in Excel's (default) fixed-size data label boxes into manually created text boxes. (See step 1 on how to create text boxes.) Position them accordingly (make sure to check the Print Preview to see how they will print; fussing is usually required to get them spaced suitably).
5. Enter the *y* axis title and the *x* axis title into separate text boxes (see step 1 on how to create text boxes); size the *x* and *y* axis titles correctly; place the *y* axis title at the top of the *y* axis; and center the *x* axis title below the *x* axis.
6. Turn off the box around the graph and the background color (right-click inside the graph, **Format Plot Area**, under **Patterns** set **Border** and **Background** both to none).
7. Change the background gridlines (right-click on any gridline, **Format Gridlines**, under **Patterns** select appropriate choices).
8. Turn off the box around the figure (right-click along the edge of the figure, **Format Chart Area**, under **Patterns** set **Border** to none).
9. Set all the fonts to the same size except the title (which should be slightly larger) (right-click along the edge of the figure, **Format Chart Area**, under **Font** set **Size** accordingly; then right-click on title text box, **Format Text Box**, under **Font** set **Size** slightly larger than that used in the rest of the chart).
10. Resize the figure so it is proportionately sized (right-click inside the graph, click and drag any of the corner boxes to resize the chart area).
11. Adjust the color of the data areas so they contrast clearly (right-click on each data area, **Format Data Series**, under **Patterns** adjust accordingly). For help with color choices, refer to the Color and Line Guide in this appendix.

Excel default settings for figure after setting font size and inserting average earnings line:



Default Settings

Excel figure with manual formatting to meet NCES standards:



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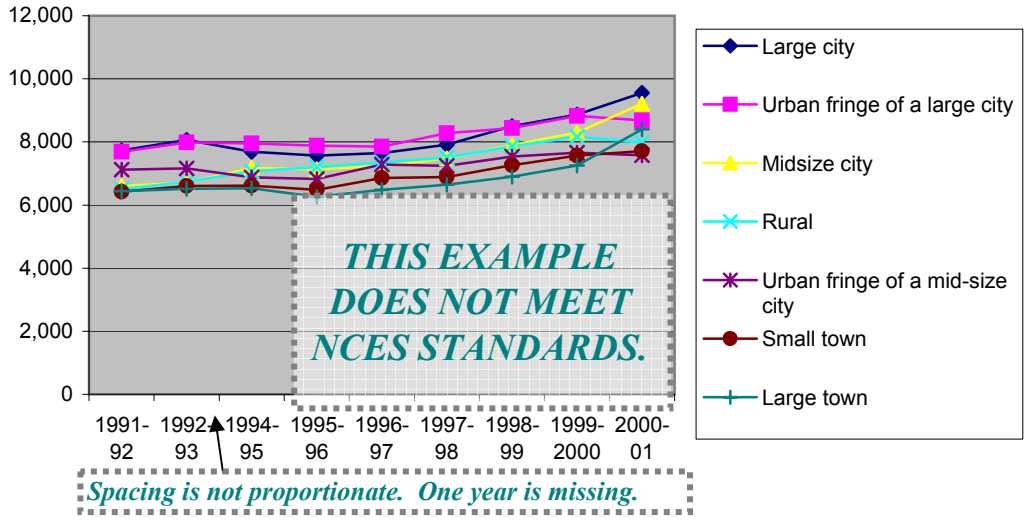
Manual formatting steps for figure 6 (dropline chart):

1. Enter the title either into a text box or into a merged cell across the top of the chart so that the title can be stretched across the figure precisely (otherwise the title's width on the page and the number of characters in the title may be arbitrarily constrained). Text boxes can be made by clicking on the text box icon in the Drawing toolbar and dragging your activated cursor to the desired size. If necessary, set the text box's background fill color to white and make sure it has no border (right-click on the text box so the **Format Text Box** dialog box comes up and, under the **Colors and Lines** tab, set the Color under Fill to white and under Line to "No Line"). For guidance on creating hanging indents in titles, see appendix H, guideline C.
2. Rescale the y axis to 200 (right-click on y axis, **Format Axis**, under **Scale** set **Maximum** and **Minimum** appropriately).
3. Transform the y axis title to read horizontally (right-click on the label, **Format Axis Title**, under **Alignment** set the **Orientation** to 0 degrees), size correctly, and place at the top of the axis.
4. Turn off the background color (right-click inside the graph, **Format Plot Area**, under **Patterns** set **Background** to none).
5. Insert a manually drawn horizontal line crossing the y axis at 100. Use the Line shape on the drawing toolbar, and then select and move line as necessary.
6. Set all the fonts to the same size except the title (which should be slightly larger) (right-click along the edge of the figure, **Format Chart Area**, under **Font** set **Size** accordingly; then right-click on title text box, **Format Text Box**, under **Font** set **Size** slightly larger than that used in the rest of the chart).
7. Resize the figure so it is proportionately sized (right-click inside the graph, click and drag any of the corner boxes to resize the chart area).
8. Adjust the color, style, and width of the data points so they are easy to distinguish (right-click on any point in each data series, **Format Data Series**, under **Patterns** adjust Marker accordingly).
9. Turn on lines to connect data points (right-click on any point in either data series, **Format Data Series**, under **Options** check High-low lines).
10. Insert a text box over United Kingdom that replicates the label but with a superscripted footnote.
11. Place tick marks under data points. First, turn on minor tick marks on the x axis (right-click on the x axis, **Format Axis**, under **Patterns** set **Minor tick mark type** as outside). Next, manually create tick marks. Set the zoom to 200% so you can be more precise with your lines. Go to "Lines" under AutoShapes on the Drawing toolbar, and select a straight line. Drag your activated cursor to draw a short line on top of the first minor tick mark. Copy and paste the line and use the arrow keys to move it on top of the second minor tick mark. Repeat the last step until you have a tick mark under every data point. Set the zoom back to normal. Use the Print Preview to see how the tick marks print; fussing is usually required to get them placed corrected as they do not usually print as they appear on the screen. When all tick marks are placed correctly, delete all the automatic tick marks on the x axis (right-click on the x axis, **Format Axis**, under **Patterns** make sure the **Major tick mark type** and **Minor tick mark type** are both set to none).

Excel default settings for figure after setting font size:

Figure 7. Public school district expenditures per student (in constant 2000-01 dollars), by selected locations: 1991-92, 1992-93, and 1994-95 to 2000-01



SOURCE: U.S. Department of Education, National Center for Education Statistics, Common Core of Data (CCD), "Public School District Universe Survey," 1991-92, 1992-93, and 1994-95 to 2000-01, "Public School District Financial Survey," 1991-92, 1992-93 and 1994-95 to 2000-01, and Geographic Cost of Education Indexes (GCEIs) available from the Education Finance Statistics Center (http://nces.ed.gov/edfin/).

Default Settings

Excel figure with manual formatting to meet NCES standards:

Figure 7. Public school district expenditures per student (in constant 2000-01 dollars), by selected locations: 1991-92, 1992-93, and 1994-95 to 2000-01

SOURCE: U.S. Department of Education, National Center for Education Statistics, Common Core of Data (CCD), "Public School District Universe Survey," 1991-92, 1992-93, and 1994-95 to 2000-01, "Public School District Financial Survey," 1991-92, 1992-93, and 1994-95 to 2000-01, and Geographic Cost of Education Indexes (GCEIs) available from the Education Finance Statistics Center (http://nces.ed.gov/edfin/).

Formatted Correctly

Manual formatting steps for figure 7 (complex line chart):

1. Enter the title either into a text box or into a merged cell across the top of the chart so that the title can be stretched across the figure precisely (otherwise the title's width on the page and the number of characters in the title may be arbitrarily constrained). Text boxes can be made by clicking on the text box icon in the Drawing toolbar and dragging your activated cursor to the desired size. If necessary, set the text box's background fill color to white and make sure it has no border (right-click on the text box so the **Format Text Box** dialog box comes up and, under the **Colors and Lines** tab, set the Color under Fill to white and under Line to "No Line"). For guidance on creating hanging indents in titles, see appendix H, guideline C.
2. Rescale the *y* axis to start at 5,000 (right-click on *y* axis, **Format Axis**, under **Scale** set **Minimum** to 5000).
3. Add a "$" sign to the highest value in the y axis by inserting a text box with "$10,000" over the "10,000" label on the y axis. See step 1 on how to make a text box with a white background and without a border to mask out the *y* axis label.
4. Insert a zero (in a text box) over the lowest value in the *y* axis (5,000) and (between zero and 5,500) insert a line break symbol or squiggly line to indicate a break in the axis scale. (To insert a line break or squiggly line, first insert a "break" in the axis by creating a small white text box without a border (see step 1) and pasting it over the axis. To create a line break, go to "Lines" under AutoShapes on the Drawing toolbar, and select a straight line. Drag your activated cursor to draw a diagonal line and copy it. Note that copied elements in a chart often appear at the top left-hand corner of the chart. Drag the copy to pair it with the original line. Align both lines with the white text box so they appear to cross at the top and bottom of the whited-out break. To create a squiggly line, go to "Lines" under AutoShapes on the Drawing toolbar, and select a curvy line. Drag your activated cursor to draw a squiggly line and align it with the whited-out break.)
5. Turn off the background color (right-click inside the graph, **Format Plot Area**, under **Patterns** set **Background** to none).
6. Set all the fonts to the same size except the title (which should be slightly larger) (right-click along the edge of the figure, **Format Chart Area**, under **Font** set **Size** accordingly; then right-click on title text box, **Format Text Box**, under **Font** set **Size** slightly larger than that used in the rest of the chart).
7. Resize the figure so it is proportionately sized (right-click inside the graph, click and drag any of the corner boxes to resize the chart area).
8. Correct the improper spacing on the *x* axis by inserting a column in the source data field where the missing year of data should be. (*If you download the electronic version of this appendix, you can see the sample source data field above, starting in cell M15. The link to download this appendix is on page G-3 of the introduction.*) Insert a white text box (with the Line color set to "No Line") over the tick mark for the year without data.
9. Fill in the gaps in the lines (i.e., in the plotted data series) by setting chart to interpolate data. (Click on the chart so boxes appear in each corner and midway on each side, under **Tools** on the menu bar select **Options,** under **Chart** select to plot empty cells as interpolated).
10. Adjust the color, style, and width of the datalines so they are easy to distinguish (right-click on any point in each data series, **Format Data Series**, under **Patterns** adjust accordingly). For help with color choices, refer to the Color and Line Guide in this appendix.

Appendix H. Guidance for Producing Tables in Excel That Meet NCES Standards

This appendix has been prepared to assist anyone preparing tables for NCES reports in Microsoft Excel. The point of this guide is not to recapitulate everything in the *NCES Statistical Standards* about preparing tables, but to show how to create tables in Excel that meet the standards.

This guide is divided into five sections that mirror the major parts of all tables: title, boxheads, table stubs, table body, and bottom of the table or notes. Within each of these sections, NCES tabular rules and guidelines are presented. (The order of presentation only loosely follows the organization of the NCES tabular guide.) Each rule and guideline is identified by a letter or letter and number for easy reference (and to avoid any confusion with the numbering system used in the NCES standards).

Throughout this guide, examples are provided to allow users to see how particular requirements of the NCES standards can be done in Excel. Some of these examples have text boxes and arrows that label parts or point out particular features that are correct or incorrect. All common errors are labeled as such, and the labels describing these errors are in italics.

Ideally, users will download this guide as an Excel file so that they can click on the various examples to see how different cells have been formatted or created, and so they can copy formatting or formulas. To download this appendix, click on this link [http://nces.ed.gov/statprog/styleguide/excel/appendixH.xls].

Note re nonprint media: In preparing and displaying tables, nonprint media should follow the recommendations of this style guide as far as is practicable. For additional guidance in this area, see the NCES web standards. Ensure that nonprint media comply with Section 508 accessibility requirements for people with disabilities. (Section 508 of the Rehabilitation Act of 1973 was reauthorized by the Workforce Investment Act of August 1998; standards for accessible technology were issued in December 2000 by the U.S. Access Board, an independent federal agency.)

TITLES

A What to include in the title

All titles should be unique and should state (1) what data are presented in the table, (2) how the data are classified, (3) where the data apply, and (4) what the time frame for the data is.

A1	What	Define the basic content and general limits of the group or subgroup that are shown in the table. Generally titles begin with either "Number of…," "Percentage of…," or "Percentage distribution of…" If a table presents only counts (e.g., number of students enrolled), then "Number of" may be dropped (in this example the title can simply begin "Enrollment…").
A2	How classified	Include information detailing breakouts of data: e.g., by control of school, by age and sex of students, etc. NOTE: This information should appear in a particular order—first describing the column headers from left to right, then top to bottom; then describing the stub (from top to bottom, if there are sub-stubs). See sample title for table 2 below (in C).
A3	Where	Make sure users are aware if the data apply to a particular country, the nation as a whole, or some geographic or political subdivision: e.g., "OECD nations," "Japan and the United States," "Central cities," etc.
A4	When	Include information making the time frame explicit: e.g., "2000," "Fall 2002," "Academic year 1998-99," "Various years, 1950-2000."

B Spacing in titles

B1 Before the actual title, insert the table identifier (i.e., a table number, letter, or letter and number) and a period. Then start the title after a customary space (generally 2/16" to 3/16").

```
Table 1.  Fall enrollment in educational institutions, by level of institution: 2001
```

B2 Insert a blank row like this under the title with a border line under the blank row. (The border line can be thick or thin.)

C How to deal with long titles

If a title will not fit on one line, make sure that the first word of every other line is aligned with the first word of the title on the first line. The easiest way to do this is to hit Alt + Enter at the end of each line and insert the table identifier again at the start of the next line, setting the font color of the table identifier to white so it appears as if a hanging indent has been inserted into the title. (Click on the title below to see one way this can be done.)

Table 2. Associate degrees conferred by degree-granting historically Black colleges and universities, by race/ethnicity, major field of study, and sex of student: Selected years, 1970-71 through 2001-02

Major field of study and sex of student	Total	White	Black	Hispan-ic	Asian or Pacific Island-er	Ameri-can Indian	Race unknown	Associate's degrees from HBCUs as a percent of total associate's degrees	
								Total	Black

Note how the order of the information in the title telling users "how classified" corresponds to the sample boxhead here. See A2 above for the rule on the order.

D How to deal with multipage table titles

D1 For each page after the first page, repeat the table identifier and the full table title, with "—Continued" added. For example,

Table 3. Revenues for public elementary and secondary schools, by source of funding and state: 1970-71 through 2001-02—Continued

Before "Continued," use an "em" dash. See W2 below for how to insert this special character.

D2 Note that there are different rules for dealing with double-page-spread tables. Refer to appendix C of the *NCES Statistical Standards,* p. 169.

E Formatting rules for titles

E1 Start with the topic (i.e., the What, see A1) of the table, followed by a comma and then the "by" list (i.e., the How classified information, see A2).

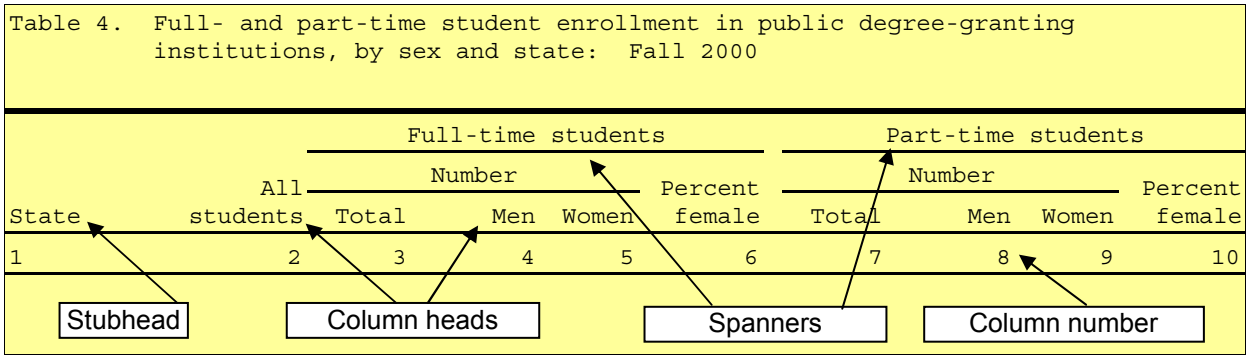
E2 End the title with a colon followed by the Where information, if any, and the data year(s). (For details on year spans, refer to appendix C of the *NCES Statistical Standards,* p. 172.)

E3 Capitalize only the first word, proper nouns, and the word following the colon.

E4 Avoid footnoting a title; use a general note (i.e., NOTE) instead.

BOXHEADS

Boxheads consist of multiple headers: a stub header or stubhead, column heads, and spanner heads that classify, describe, or qualify the columns to which they refer. See sample boxhead for table 4 below.



F General formatting for all headers

F1 All header types should be in normal font (not bold). Use the same font in all tables.

F2 Capitalize only the first letter of the first word in each column head and the first letter of proper nouns.

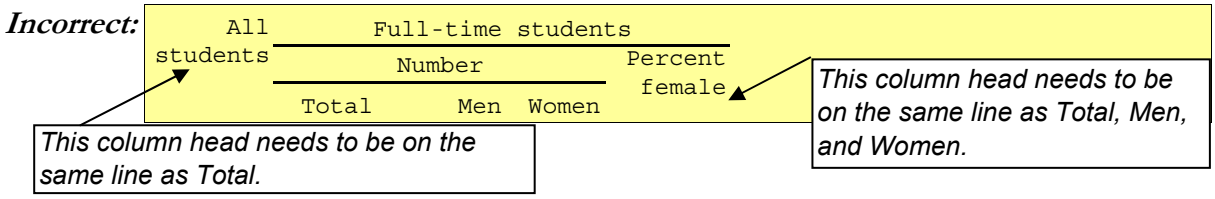
G Formatting differences among headers

G1 Stubhead should be left flush and should describe, define, or amplify the table stubs or stub captions.

G2 Spanners (headers that span more than one column) should be centered horizontally.

G3 Column heads should be right flush and should read horizontally. If you need to hyphenate a word and have word wrap turned on, insert your hyphen and hit Alt + Enter to insert a hard return. If you do not have word wrap turned on, you can put the text into two cells.

G4 The stubhead and all column heads should rest on the same line (the bottom line of the boxhead).



G5 If there is a "Total" column, it should appear to the left of the columns it sums.

G6 If there is a column with derived numbers (e.g., averages, ratios, percentages), it should appear to the right of the columns with the base data.

G7 Take care with race/ethnicity column heads; refer to standard 1-5 of the *NCES Statistical Standards* on what labels to use (pp. 28-32).

H Column numbers

H1 Column numbers may be used only if you have a large number of columns. If used, column numbers should be flush left under the stubhead and right flush for all other columns. They should not be in bold.

H2 Column numbers can be inserted as numbers without parentheses (as in the sample boxhead for table 4 above) or with parentheses and without a line above them (as in the sample boxhead for table 5 below).

I Placing lines around and in a boxhead

I1 Horizontal lines should be above and below the entire boxhead to set it off from the title and the table body. The thickness of these lines may vary from report to report, but should be consistent within a single report. These lines are inserted using the border line options under **Cell Format**.

I2 Horizontal lines need to be put under the entirety of each spanner to indicate which column heads the spanner refers to.

I2a A space between adjacent spanners (such as in the sample boxhead for table 4 above) can be created by inserting an extra column between the two spanners. This column provides space for a cell with the border lines turned off to separate the two horizontal spanner lines.

I3 A vertical line should not separate the stubhead and the first column head unless vertical lines are used throughout the boxhead to separate spanners and column heads.

I4 Either vertical lines or spaces may be used between spanners and column heads. Whichever style you choose, use it consistently throughout your document. The sample boxhead for table 5 below provides an example of vertical lines between all headers. Note that care must be taken to make sure that the lines do not touch the text or impair the legibility of any of the headers.

I5 Always check how boxheads appear using print preview and after printing out the table. Boxheads do not always print as they appear on the screen.

Make sure that all lines are complete and inserted consistently throughout a boxhead.

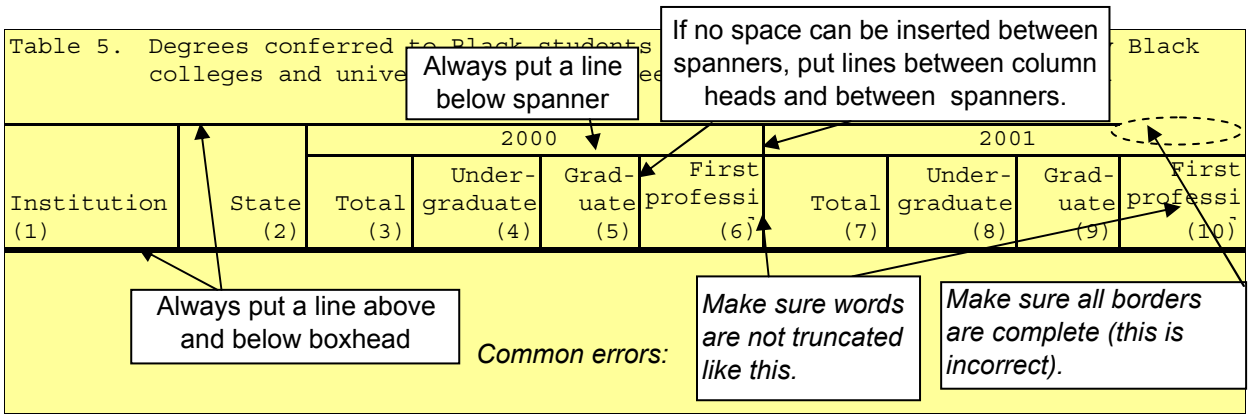


TABLE STUBS

Table stubs (or row labels) appear in the first column of a table and describe the data appearing in that particular row. A table may have several different types of stubs: a "Total," indicating a grand total; a rubric for a major group, indicating a subtotal for this group; and a rubric for a subgroup and/or items (or characteristics), indicating subtotals for this subgroup or items.

J Placement

J1 All stubs should be formatted flush left. (Text must be flush left in order for indent to work.)

J2 Place grand totals at the top of the column stub. Organize all the items in a stub in a logical sequence. Some typical sequences are alphabetical, geographical, chronological, numerical, etc. Sometimes the arrangement of items may fall into two or more such sequences (e.g., major geographic area by size and alphabetic within major geographic areas).

J2a Years: Convention requires year entries showing trends to be chronological, running sequentially from earliest to latest.

K Indentation

K1 Each type of stub is indented a different number of spaces depending on its level of subordination or on the number of other different types of stubs appearing in the table, such as in the example below. The point of having different spacing for different types of stubs is to allow readers to easily distinguish among the different logical groupings presented in a table. The example below identifies the names NCES uses for the different types of stubs to indicate their level of subordination. To the right of the example are the spatial relationships that NCES uses to distinguish among the different logical groupings presented in a table. Note that the size of indentations varies with the font and the font size used. In your tables, approximate the spacial relationships provided in the example below. As a general rule of thumb, a 2 space indent has customarily been about 1/8". The rules for how many spaces to indent are explained below in the discussion of each type of stub.

Stubhead	Teacher characteristic	Indented spaces from margin: Stub	Indented spaces from margin: Overrun
Total	**Total**	3 or 5	6 or 8
Major group	Elementary school teachers	0	3
Subgroup 1	Teaching in public schools	2	5
Subgroup 2	Sex	4	7
Item (or characteristic)	Male	6	9
Item (or characteristic)	Female	6	9

K2 For the total: If the stub includes another level or subordinated group, indent the total about three spaces. Indent about five spaces if there are two or more levels of subordination (as in the above example).

K2a If the first line of a table is Total, that stub should be indented. If there is not room to set it off with a blank row underneath it, the whole row should be in bold (as in the example below).

K Indentation—Continued

Stub header	A	B	C	D	E	F	G	H
1	2	3	4	5	6	7	8	9
Total	**†**	**9,524**	**8,745**	**857**	**10**	**655**	**635**	**20**
Item 1	AL	233	242	34	0	342	234	2
Item 2	CA	29	48	27	1	45	89	5
Item 3	CT	84	98	78	0	93	236	4

K3 For a major group: Always start the stub at the left margin (i.e., do not indent the first line).

K4 For subgroups: Indent two additional spaces for each subsequent level of subordination (e.g., a total of four spaces for the third-level group and six spaces for the fourth level).

K5 For overrun lines: Indent any overrun lines three more spaces than the line being continued. [An "overrun line" refers to any line of text for a stub caption that is too long to fit on one line and needs to "run over" onto a second line.] For examples of overrun lines, see both pages in the sample stub below.

K6 For continuation lines: When a category with subcategory listings breaks over to another page, all superior categories should be repeated, with the word "—Continued." Subcategory listings should be indented the same on all pages. For example:

First page

```
Foreign languages ...............
  French ........................
  Spanish .......................
  Other foreign languages ........
Social sciences including psycho-
   logy and history ..............
  U.S. history ..................
  World history .................
  Other history:
    Mesopotamian, Egyptian,
        and Greek history...........
```

Next page

```
Social sciences including psycho-
  logy and history—Continued ....
 Other history—Continued
   Oriental history ............
   Local history ...............
 Sociology .....................
 Political science .............
   Governance ..................
   Political economy............
 Psychology ....................
```

← Dotted lines indicate desired spacing.

L Vertical spacing

L1 Normal vertical spacing (i.e., normal spacing between rows) in the stub leaves a blank line between the total and the first group caption (see example on next page), between group captions, and between a subordinate series and a following superior group caption (e.g., between the last item of a minor group series and the major group caption just below).

L2 When available vertical space is tight, reduce the height of blank lines or remove all blank lines between stub captions and then bold total and bold all major group (subtotal) captions if there are subgroups under them.

L3 It is customary to leave a blank row between every 5 items when a stub has more than 10 items under a single category (e.g., states, institutions). See example below.

State	Total direct general expenditures (in millions)
(1)	(2)
United States	$1,398,533
Alabama	20,119
Alaska	7,131
Arizona	20,302
Arkansas	10,662
California	180,875
Colorado	20,068
Connecticut	19,688
Delaware	4,483
District of Columbia	4,630
Florida	71,631

Blank row to set off total from the first group of captions.

Blank row to break long list of items into groups of five.

M Leaders

M1 Leaders are rows of periods connecting the last word of a stub caption with the first data column when there is a wide space between the two. Leaders are optional.

M2 Make sure that leaders begin after one space after the end of the row label and go all the way to the end of the cell as in the example above. Unlike in Word, leaders must be entered by hand in Excel.

N Repeated stubs in multipage tables

N1 For tables that run more than one page, copy and insert the stub on the next page. Do *not* use the "columns to repeat at left" option under **Page Setup** and **Sheet** in Excel, as this will not give you the correct title since you need to insert "—Continued" (see D1).

N2 For a table with a double-page spread, the table stub should be repeated on the right side of the right-hand page. Line numbers may be substituted for the right-hand stub if space is tight.

O Line numbers

Insert line numbers for reference for tables with a large number of entries in the stub or to avoid repeating an entire stub in the right-hand side of a double-page spread. (For more information, see appendix C of the *NCES Statistical Standards,* pp. 180-181.)

TABLE BODY

P Columns and rows

P1 Vertical border lines may be inserted to divide data columns. They are optional. However, if they are used, space the entered data so they do not touch the vertical border lines (as in the example below). There also should be no line along the left-hand side or the right-hand side of the table.

P2 Use the indent button to indent stubs that should be indented (do not use the space bar as it will not always be consistent).

Agriculture	341	35	281	1	1	0	20	3
Men	147	20	113	1	—	0	11	2
Women	194	15	168	—	1	0	9	1

Q Cells

Q1 Insert data or a symbol flush right in every cell.

Q1a For numerical entries, if the flush right icon does not make the contents of the cell flush right correctly, then select cells, under Format on the menu bar, select Cells, then the Number tab, and select "Number" from the Category menu on the left, and choose either "-1234.10" or "(1234.10)" as appropriate from the Negative numbers menu on the right.

** If you can't get this to work, use the format paint brush to copy formatting from a table with correctly formatted cells.*

Q2 No cells should be left blank in a table.

When no data apply in a category, insert into the cell: † ← Be sure to make flush right

When no data are available, insert into the cell: — ← Be sure to make flush right

Don't insert the dash in Courier New, or you get: –

**See section W for details on how to insert the special symbols.*

R Footnote callouts

R1 When you need to insert a footnote callout in Excel, it should be superscripted (highlight the number and go to **Format Cells**, under **Font** select superscript). The cleanest and most legible footnotes print in Verdana. If your rows are close, use font size 8 to avoid having them clipped at the top.

R2 If the footnote is for a label, just insert the footnote callout at the end of the label, as in the following example: Undesignated fields[1] .....

R3 If the footnote is for a number in a cell, insert the footnote callout in a separate column (as is done below), so that the number (not the footnote callout) remains decimally aligned with the other numbers in the column.

R4 If a numbered footnote callout stands alone in a cell, put it in parentheses: e.g.,

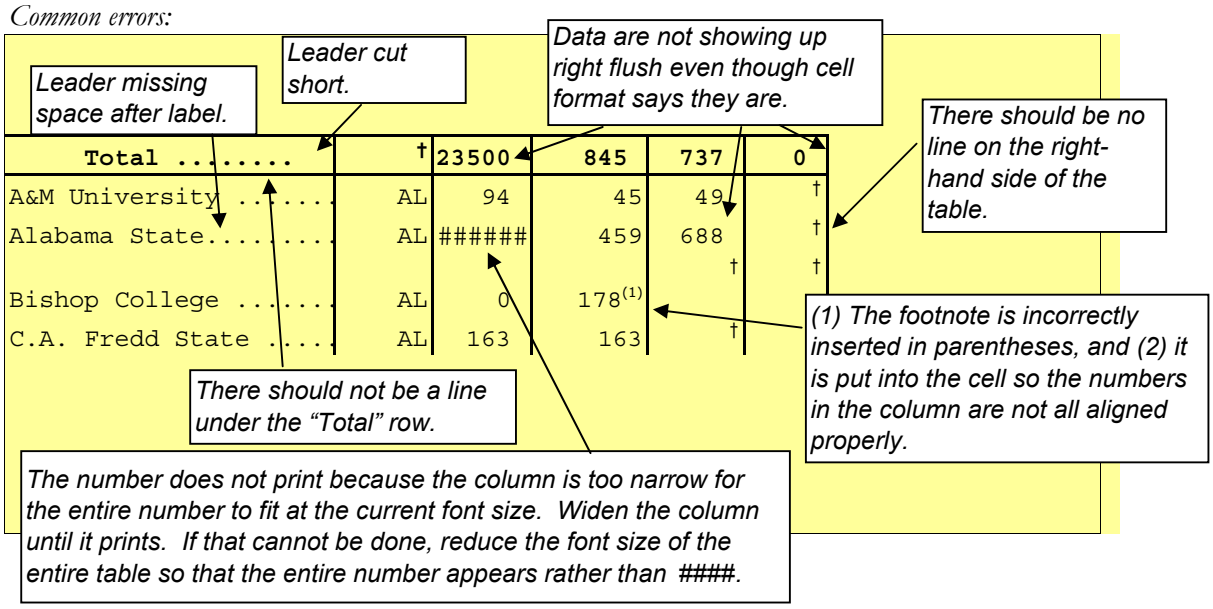
194.5 [3]	
	(4)

R5 The order for numbering footnote callouts is left to right within a line, then down, as in the example below.

R5a Note that spanners come above all column heads, so they must be numbered first (see the example below).

Teacher characteristic[2]	All teachers [3]	Elementary teachers[1]		
		All	Public	Private [4]
Total	**100.0**	**76.7**	**79.0**	**21.0**
Sex[5]				
Male	53.7 [6]	44.9	48.2	32.4
Female	46.4	55.1	(7)	67.6

Common errors:



S Decimals and zeros

S1 All figures in a table that are reported in the same unit of measurement should present data carried out to the same decimal place. (Use **Format Cells** under **Number** to set the decimal place.)

S2 In order to place a zero in a cell, the measure must actually be zero based on universe data. It is expressed as a single zero without a decimal point, if all other numbers in the column are rounded to whole numbers. If the other numbers in the column are carried out to some decimal place, carry out the zero the same number of decimal places (e.g., 0.0 or 0.00).

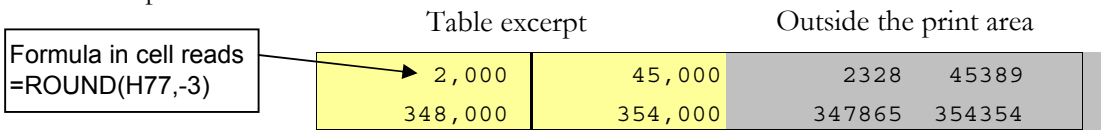
S3 If the column consists entirely of whole numbers, do not use decimal points.

S4 Figures of value less than 1 have a zero to the left of the decimal point (e.g., 0.7) unless the number cannot be greater than 1 (e.g., levels of statistical significance, proportions, correlations). To enter figures with a value less than 1 without a zero, enter the figure as text (i.e., type a ' before the numeral or format the cell so the Number Category is "Text."

T Rounding

T1 In text and summary tables, round percentages to no more than one decimal place, round four- and five-digit numbers to hundreds, and round six-digit numbers and over to thousands. (For details on the rules for reference and methodology tables, refer to standard 5-3-5 of the *NCES Statistical Standards,* p. 100.)

T2 The best way to round numbers in an Excel table is to enter the unrounded data outside the print area and to enter the formula '=ROUND ([cell with unrounded data], -[the number of digits from the ones place you want the data rounded to])' in the table cell. Thus to round to the thousands place, enter -3. See the example below.



U Symbols

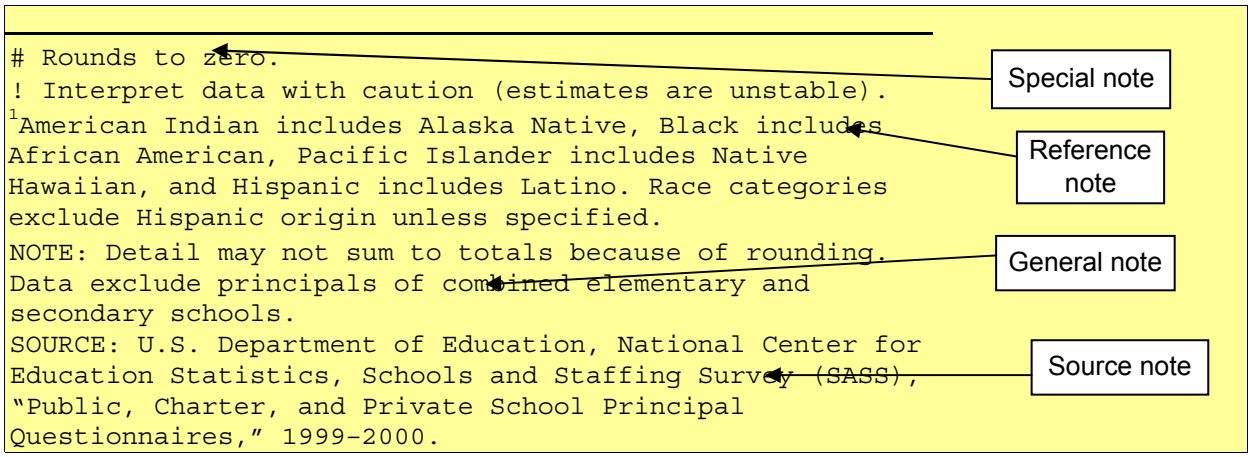
U1 When all the figures in a column pertain to money, the first figure in the column should be preceded by a dollar sign ($). None of the other figures in the column should have a dollar sign.

U2 A percent sign (%) should not follow figures in the field. Instead, write out the word "percent" wherever it is needed in a spanner, stub, column head, etc. Use the word "percentage(s)" in a title.

BOTTOM OF THE TABLE

V Organization

V1 The sections of notes at the bottom of the table go in the following order: special (symbol) notes, reference (numbered) notes, general note, and source note.



V2 There should be no extra (blank) row under the last line of data and the first line of notes, or between any special notes, footnotes, the NOTE, and/or the SOURCE.

V3 Each note and source at the bottom of a table should be inserted in its own row but in only one row, with cells under the width of the table merged and word wrap turned on. (Avoid entering the note and source into cells in multiple rows.) Make sure the entirety of the text appears when the table prints and that there are no unnecessary blank lines (always check for this in Print Preview before printing).

W Special notes

W1 When special notes are used they should be listed in the following order:

```
– Not available.  [Note: Use an em dash for this special symbol.]
† Not applicable.
# Rounds to zero.
! Interpret data with caution.
‡ Reporting standards not met.
* p < .05
```

W2 The symbols for these special characters can either be copied and pasted from Microsoft Word or entered using the following key strokes:

Hold down the Alt key and type on the numerical keypad 0150 to get – (en dash).

Hold down the Alt key and type on the numerical keypad 0151 to get — (em dash).

Hold down the Alt key and type on the numerical keypad 0134 to get †.

Hold down the Alt key and type on the numerical keypad 0135 to get ‡.

Note: If you are using a laptop without a separate numerical keypad, you will need to turn on the Numbers Lock and enter the numerals using the keyboard's alternative numerical keypad (not the numbers across the top of the keyboard). Typically on the alternative numerical keypad 1, 2, and 3 correspond with the keys J, K, and L, respectively.

X Reference (numbered) notes

Footnote numbers should be superscripted and match their corresponding footnote callout in the body of the table in terms of size and font. Insert a space between the number and the first character of the footnote. For example:

```
[1] Hinds Community College, Utica Campus reported 152 degrees but not by field
of study.
```

Y General note

Y1 Not all tables need a general note. For those tables that do, capitalize NOTE and put a colon after it to indicate a general note.

Y2 If there are any race/ethnicity labels used in the table, insert the following text in the NOTE *(if the text below is not appropriate for a particular table [e.g., the category Other is used instead of American Indian and Pacific Islanders], adjust this text accordingly; for further guidance on phrasing this note, see standard 1-5-4 of the* NCES Statistical Standards, p. 30*):*

```
NOTE: American Indian includes Alaska Native, Black includes African
American, Pacific Islander includes Native Hawaiian, and Hispanic includes
Latino. Race categories exclude Hispanic origin unless specified.
```

Y3 If there are percentage distributions or data that should sum to totals, insert the following text in the NOTE:

```
NOTE: Detail may not sum to totals because of rounding.
```

Z Source

Every table needs a source note, which begins with SOURCE in capitals and a colon. The source note should cite the report, relevant survey(s) and subsurvey(s) if any, data reference year, file version number, department name, and agency name. Here are some common examples:

```
SOURCE: U.S. Department of Education, National Center for Education
Statistics, Integrated Postsecondary Education Data System (IPEDS), Fall
2002.
```

```
SOURCE: U.S. Department of Education, National Center for Education
Statistics, Common Core of Data (CCD) surveys. (This table was prepared April
2002.)
```

```
SOURCE: U.S. Department of Education, Institute of Education Sciences,
National Center for Education Statistics, National Assessment of Educational
Progress (NAEP) 1992, 1994, 1998, 2000, 2002, and 2003 Reading Assessments.
```

```
SOURCE: U.S. Department of Education, National Center for Education
Statistics, Schools and Staffing Survey (SASS), "Public School
Questionnaire," "Charter School Questionnaire," and "Private School
Questionnaire," 1999-2000.
```

AA Multipage table notes

The end of each page preceding the last page of a multipage table should carry a note advising the reader to "See notes at end of table." The notes for a multipage table appear on the last page only.

Asian or Pacific Islander.....	8	1	0
American Indian	1	0	0
Nonresident alien	47	72	27
See notes at end of table.			

Example of the bottom of the first page of a multipage table.

Appendix I. NCES Graphic Standards for Publication and Other Product Covers, Title Page, and Back of Title Page

National Center for Education Statistics Policy and Procedures

Directive No: 02

Date: January 8, 2003

Subject: Graphic Standards for NCES Publication Covers

This directive is intended to ensure that all NCES publications and other products share common design and style elements. The graphic design standards are not intended to limit creativity but are designed to help assure that NCES presents a consistent image that builds product recognition among users and potential users of education data. Although the standards were developed for standard-size publications (8 ½ x 11 inches), they may be adapted for use in designing covers for all NCES products, including booklets, brochures, CD-ROMs, folders, etc. Templates and logos are available from the Office of the Commissioner by calling 202-502-7300.

Revisions and additions to these graphic standards will be issued as necessary.

Val Plisko

Associate Commissioner

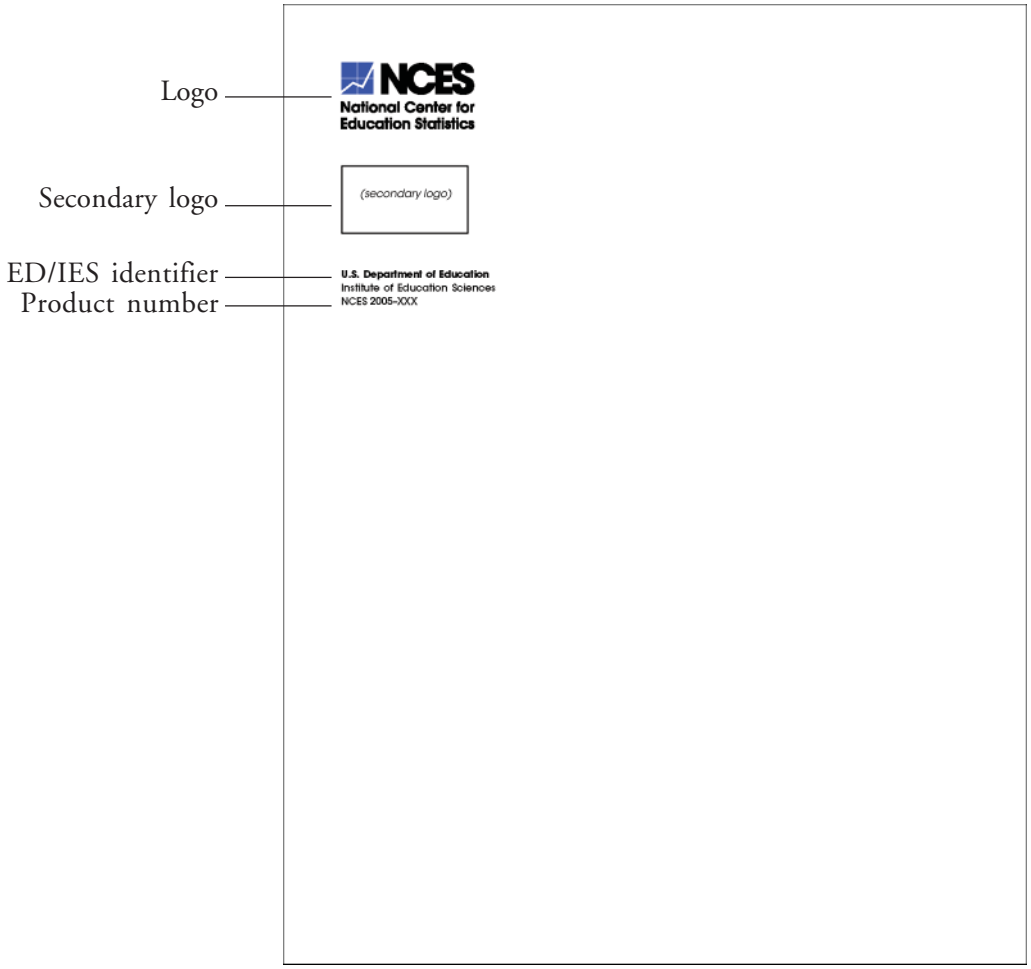
Graphic Standards for the Design of NCES Media Products

Purpose: To ensure that all National Center for Education Statistics (NCES) products are designed to reinforce the identity of NCES and to build product recognition among users and potential users of education data.

NCES Masthead

Standard: All NCES products must bear the NCES masthead.

Details: The NCES masthead consists of the NCES logo, Department identifier (ED/IES), and publication/product number. Details on each of these elements, including their placement on the "grid," follow. The masthead should appear in the same location on all covers, but—with approval from the OC—it can vary depending on the layout needs of a specific product (e.g., CD-ROM, brochures).



NCES Logo

Standard: All publications and materials produced for and by the National Center for Education Statistics (NCES) must carry the NCES logo, the official identifier for the National Center for Education Statistics. The logo must appear prominently on the front of all products.

Details: The NCES logo is a major component of the Center's graphic identity. It consists of two parts: the square logo and the logotype "NCES." The square has four quadrants with a graph line moving from lower left to top right. The NCES logo takes three forms: "square" "stacked" and "one-line."

Standard Usage

The logo is to be used primarily as a two-color logo. The square is PMS 661 or CMYK: 100 72 0 6 (*blue*); and the Logotype is 100 percent black. Use the square logo on the front of publications and other printed materials and use either the stacked or one-line logos on the spine of publications.

"square logo"

"stacked logo"

"one-line logo"

To access graphic files of these logos (from the electronic version of this appendix), click on the logo name above.

Alternate Usage

When the logo is to be used on different color backgrounds, alternate treatment may be used.

Black logo
The square and letters "NCES" are 100 percent black.

Reversed logo
The square and letters "NCES" are reversed to white.

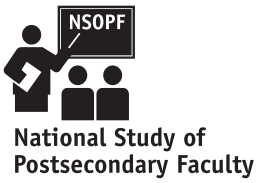
Solid color logo
The square and letters "NCES" are 100 percent tint of a color.

Secondary Logos

Standard: In addition to the NCES logo, the logo(s) of all NCES entities or other agencies (also called secondary logos) from which a product originates may appear on the cover of NCES products.

Details: Not all NCES entities have a secondary logo. However, if one exists, it must appear on the cover. Multiple secondary logos may appear on the cover of a publication. Set secondary logos in proportion to the NCES logo and to be consistent with the NCES logo in regard to color (e.g., when the NCES logo is used in full color, so should the secondary logo; when the NCES logo is used in 100% black, so should the secondary logo).

Examples



U.S. Department of Education/IES Identifier

Standard: The front of all NCES publication covers must bear the organization's imprimatur—"U.S. Department of Education, Institute of Education Sciences"—and the NCES publication number, if applicable.

Details: The Department/IES identifier and publication number lines should always appear as follows:

U.S. Department of Education
Institute of Education Sciences
NCES 200X–XXX

The Department of Education line must be set in Avant Garde Gothic Bold (8 pt., 11 leading); set the IES and publication number lines in Avant Garde Gothic Medium (8 pt., 11 leading).

Typefaces and Fonts

Standard: The text on all NCES publication covers must be typeset in Adobe Avant Garde.

Details: The typeface and fonts used in designing NCES publication covers help to foster a consistent graphic look. Adobe Avant Garde fonts have been chosen to complement the NCES logo.

Avant Garde Gothic Book

Avant Garde Gothic Medium

Avant Garde Gothic Demi

Avant Garde Gothic Bold

Color Palette

Standard: Use colors that work well with the NCES logo and with type that must be reversed out.

Details: Color is an integral component of a graphic identity program. The 10 colors below are recommended for use in NCES publications because they work well with the NCES logo; however, other colors may be used, especially if a program, survey, or other activity already has an established "look" with color(s) associated with it. The colors below may be especially useful to programs desiring to create families of publications.

PMS 568 CMYK:83 0 56 38	PMS 661 CMYK:100 72 0 6	PMS 187 CMYK:0 91 72 24	PMS 1385 CMYK:0 47 100 7	PMS 430 CMYK:6 0 0 47
PMS 7474 CMYK:90 0 28 22	PMS 2587 CMYK:72 79 0 0	PMS 1665 CMYK:0 65 87 0	PMS 477 CMYK:72 87 100 0	Process Black CMYK:0 0 0 100

NOTE: Tints of spot color should not be used on the front cover of publications.

Grid

Standard: All NCES standard-size publication covers (8.5 x 11 inches) must be designed on a grid with

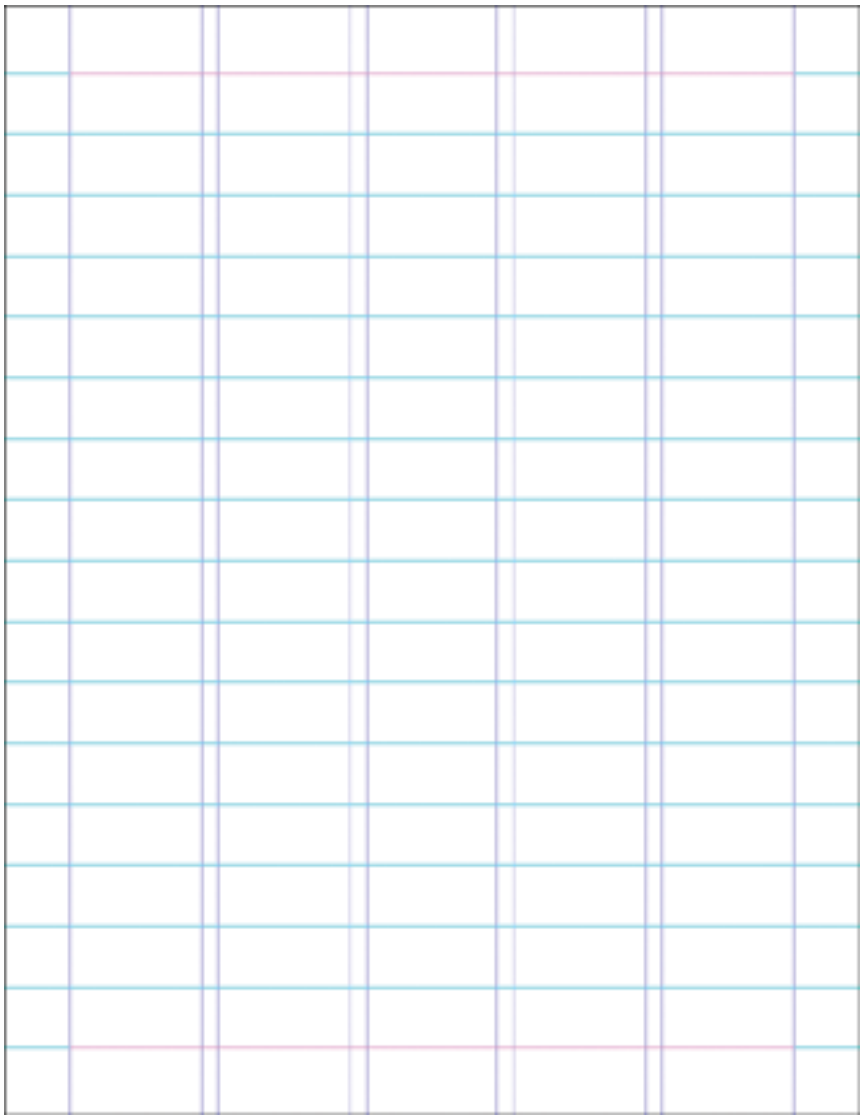
(1) a *top* margin of 4p;

(2) *bottom/left/right* margins of 4p;

(3) 5 *columns* overall; and

(4) a *gutter* width of 1p.

Details: The area between the top and bottom margins is broken into 16 equal modules, each 3p7.5 in height. This provides a design that can be made of 2, 4, 8, 12, or 16 horizontal divisions. The page is vertically divided into 5 columns with a 1p gutter.



NOTE: Adapt the grid—a pattern of horizontal and vertical lines forming rectangles of uniform size—for designing covers for other NCES products, including brochures, booklets, CD-ROM covers, and folders.

Placement of Elements on Grid

① **NCES logo.** Place in the first column in the first module of the grid.

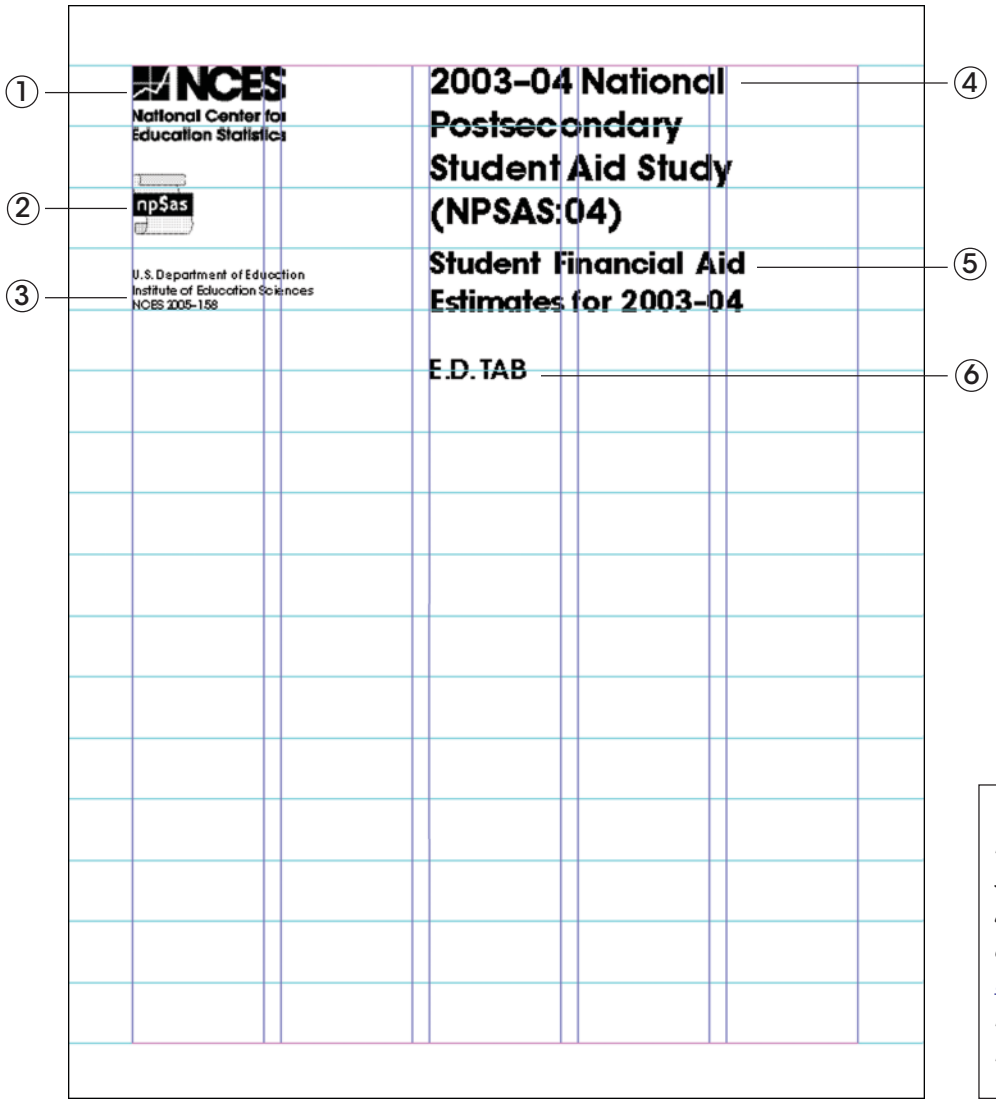
② **Secondary logos.** Place under the NCES logo in the first column in the third, fifth, seventh module, etc. Set in proportion to the NCES logo.

③ **Department/IES identifier** and **product number.** Place in the first column in third, fifth, seventh module, etc. Set the first line in Avant Garde Gothic Bold and the other lines in Avant Garde Gothic Medium (8 pt, 11 leading).

④ **Publication title** (level 1). Place in the third column in the first module. Set in Avant Garde Gothic Bold (25 pt, 31 leading).

⑤ **Subtitle** (level 2). Place below the Publication title 3p from baseline to baseline. Set in Avant Garde Gothic Demi (21 pt, 27 leading).

⑥ **Type of product** (level 3). Place below the Publication title (or Subtitle if there is one) 4p from baseline to baseline. Set in Avant Garde Gothic Demi (19 pt, 23 leading).



To access Microsoft Word templates for the standard front cover and back cover formats, click on front cover/ back cover templates in the electronic version of this style guide.

NOTE: Depending on the type of product (e.g., publication, brochure, CD-ROM), and the length of the title or subtitle, the font sizes may need to be adjusted.

Artwork and Cover Designs

Standard: All artwork used in NCES publications must be of high quality, appropriate to the topic, and reflect racial and ethnic diversity.

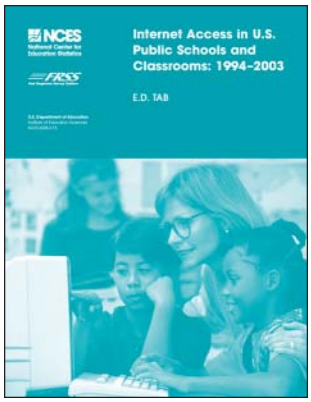
Details: NCES contractors have access to photographs that meet the above criteria. Carefully select photographs. Choose photographs that are appropriate for the topic.

Photographs (or illustrations) must be displayed in one of the seven formats described below. If your program/survey/activity already has an established "look" and contains certain elements you would like to retain, please contact the Office of the Commissioner to discuss how your look can be adapted to the standards.

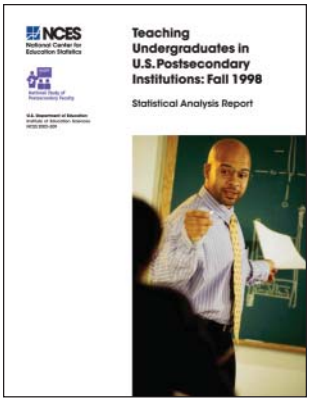
(1) *Full-size photograph.* The images used with this layout should be simple with areas where type can be overlaid. Photograph bleeds off all four edges of the page. Text color should be consistent with the treatment of the logo(s): either all black, 100% color, or reversed out.

(2) *Photograph with white field.* The bottom, right, and left sides of the image bleed off the edges of the page. The height of the white field depends on the length of the title. Start image at least one module below the end of the title text. Text color should be consistent with the treatment of the logo(s): either all black, 100% color, or reversed out.

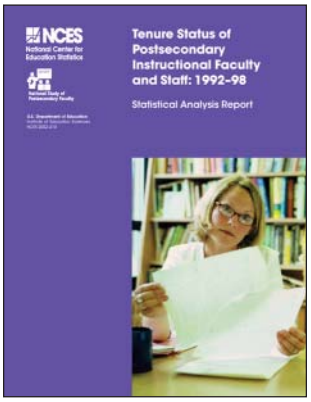
(3) *Photograph with color field.* The bottom, right, and left sides of the image bleed off the edges of the page. The height of the color field depends on the length of the title. Start image at least one module below the end of the title text. Text color should be consistent with the treatment of the logo(s): either all black, 100% color, or reversed out.



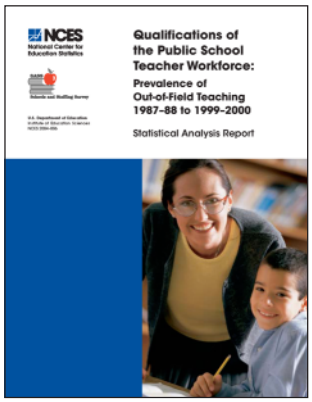
(4) *Small photograph with white field.* Place photo in third column and bleed off the right and bottom edges. Vertical placement depends on the length of the title. Place the photo at least one module below the end of the title. Text color should be consistent with the treatment of the logo(s): either all black, 100% color, or reversed out.



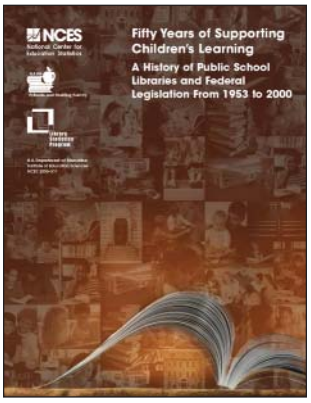
(5) *Small photograph with color field.* Place photo in third column and bleed off the right and bottom edges. Vertical placement depends on the length of the title. Place the photo at least one module below the end of the title. Text color should be consistent with the treatment of the logo(s): either all black, 100% color, or reversed out.



(6) *Small photograph with white and color field.* The height of the white field depends on the length of the title. Start image and color column at least one module below the end of the title text. Color stretches from the left edge across the second column. Text color should be consistent with the treatment of the logo(s): either all black, 100% color, or reversed out.



(7) *Other artwork (illustration, line art, photo montages, etc.).* The images used with this layout should have areas where type can be overlaid. Artwork should be treated in one of the formats described above in regard to the grid. Text color should be consistent with the treatment of the logo(s): either all black, 100% color, or reversed out.



NOTE: When selecting image, be sure that there is enough extra image to provide "bleed" for the printer, usually 1/8 inch to 1/4 inch.

Spine

Standard: All NCES perfect-bound publications must have the NCES logo, publication title, and year of publication printed on the spine unless the spine is less than 1p wide (about 72 pages). Publications with spines less than 1p in width should be saddle stitched with *no* spine information.

Details: The spine is set within the same horizontal modules as the cover. The top and bottom margins are 4p with 16 modules 3p7.5 in height.

① On spines that are 4p or larger in width, use the *NCES stacked logo* and set the left and right margins to 0p9.

② On spines that are 2p to 4p in width, use the one line *NCES logo* and set the left and right margins to 0p3 (3 points).

③ On spines that are less than 2p in width, use the *logotype* NCES alone and set the left and right margins to 0p3.

Titles are set in the fourth module and centered vertically on the spine. The *publication date* must be placed centered on the baseline in the 16th module on any spine greater than 6p, and set vertically and right justified against the 16th module in spines less than 6p.

The spine should be either one color or white (depending on the design of the cover). The elements of the spine—logo, publication title, and year of publication—should match the coloration of the cover.

Type Style. Set in Avant Garde Demi. Font size and leading are to be set between the minimum (8 pt., 10 leading) and the maximum size (21 pt., 25 leading).

NOTE: Graphic designers should decide the proper font size to fit the spine.

Back Cover

Standard: The back cover of all NCES publications must carry the U.S. Department of Education seal, ED Pubs mailing address, and mail indicia.

Details: The *seal* is centered at the bottom of the page (set in the 14th module in the third column) and its diameter is 8p.

The *return address* is set 4p from the top and 4p from the left, following the grid. Set in Avant Garde Gothic Medium (9 pt, 11 leading) and other lines in Avant Garde Gothic Book (9 pt, 11 leading). The line in the return address is set in color and is 0p2 wide. The return address follows and must be set as shown.

U.S. Department of Education
ED Pubs
8242-B Sandy Court
Jessup, MD 20794-1398

Official Business
Penalty for Private Use, $300

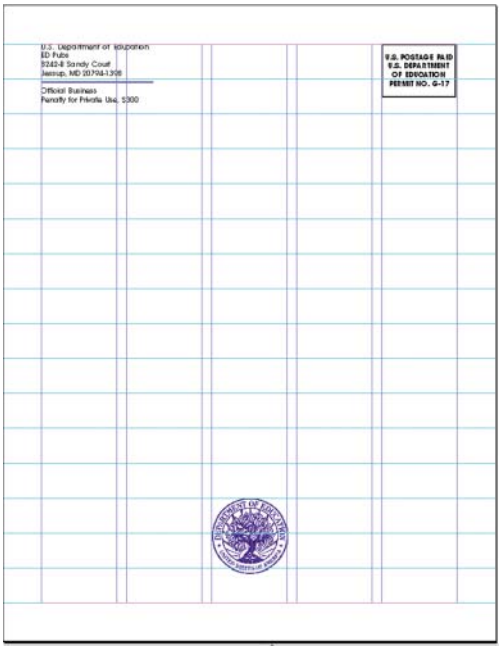
The *mailing indicia* is set 4p from the top and 4p from the right. The indicia box is 0p2 wide. Set in Avant Garde Gothic Bold (9 pt, 11 leading). The indicia is always set in black or 100 percent color and in all caps. Text for the mailing indicia follows.

U.S. POSTAGE PAID
U.S. DEPARTMENT
OF EDUCATION
PERMIT NO. G-17

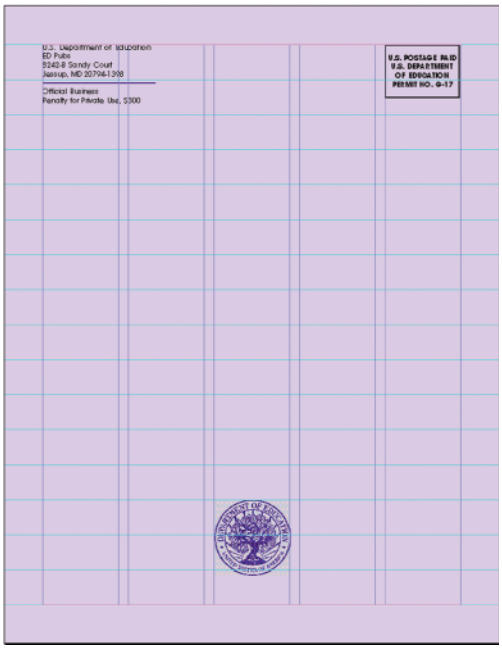
The back cover has three design options

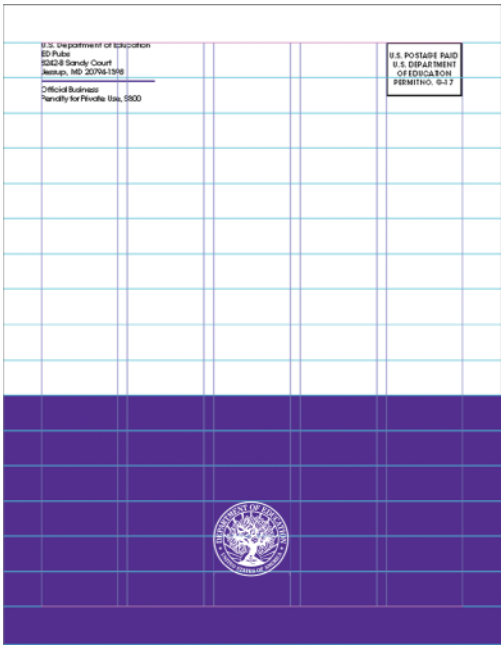
- Full page with a 20 percent ink color and the seal set in 100 percent of the color.
- 100 percent color bar on the bottom third of the page and the seal is reversed to white. The bar begins in the 11th module down and bleeds off the right, left, and bottom margins.
- Plain white and the seal set in 100 percent of the color.

The color is the same color used on the front cover. The seal is set in the 14th module in the third column; its diameter is 8p.



To access Microsoft Word templates for the standard front cover and back cover formats, click on front cover/back cover templates in the electronic version of this style guide.



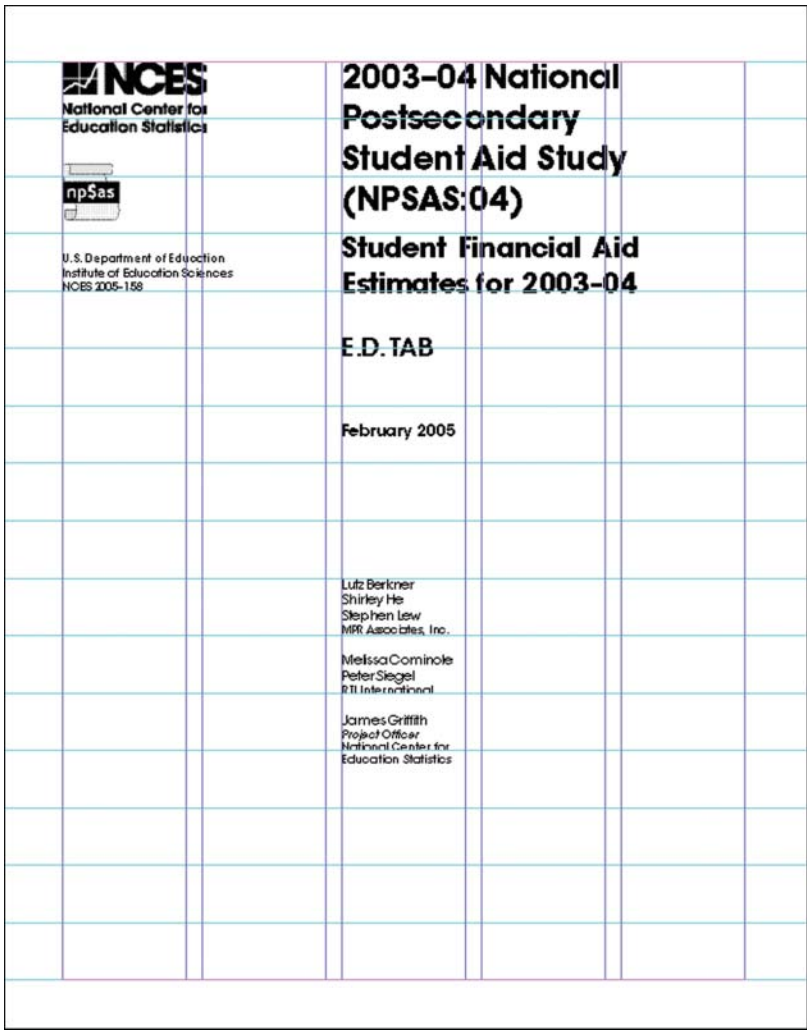


Title Page

Standard: The title page of all NCES publications must match the cover, except that the title page also includes **the month and year of publication,** and **the name(s) of the author(s)/project officer and their affiliations**. No photographs or line art print on title page. The title page prints in black and white.

Details: The month and year of publication are placed 5p below all subtitles/report descriptors. Set names in Avant Garde Gothic Demi (12 pt., 14 leading).

Names of author(s)/project officers, and their affiliation, are set in the third column in the 10th module, with 2p of space between groups of author(s)/project officers. Set names in Avant Garde Gothic Book (10 pt., 12 leading); titles (e.g., *Project Officer*) in Avant Garde Gothic Book Oblique (8 pt., 9.5 leading); and affiliations (e.g., MPR, ESSI, NCES) in Avant Garde Gothic Demi (8 pt., 9.5 leading).



To access Microsoft Word templates for the standard title page format and boilerplate format for print or web-only publications, click on either title page/boilerplate templates—print or title page/boilerplate templates—web in the electronic version of this style guide.

Back of Title Page

The back of title page (also known as the boilerplate page) is required in all publications and is numbered with a lowercase Roman numeral ii, which does not appear on the printed page. The page contains the masthead showing

① **U.S. Department of Education,** Secretary's name and title;

② **Institute of Education Sciences,** Director's name and title;

③ **National Center for Education Statistics**, Commissioner's name and title;

④ **NCES statement** of purpose from NCES enabling legislation and feedback information;

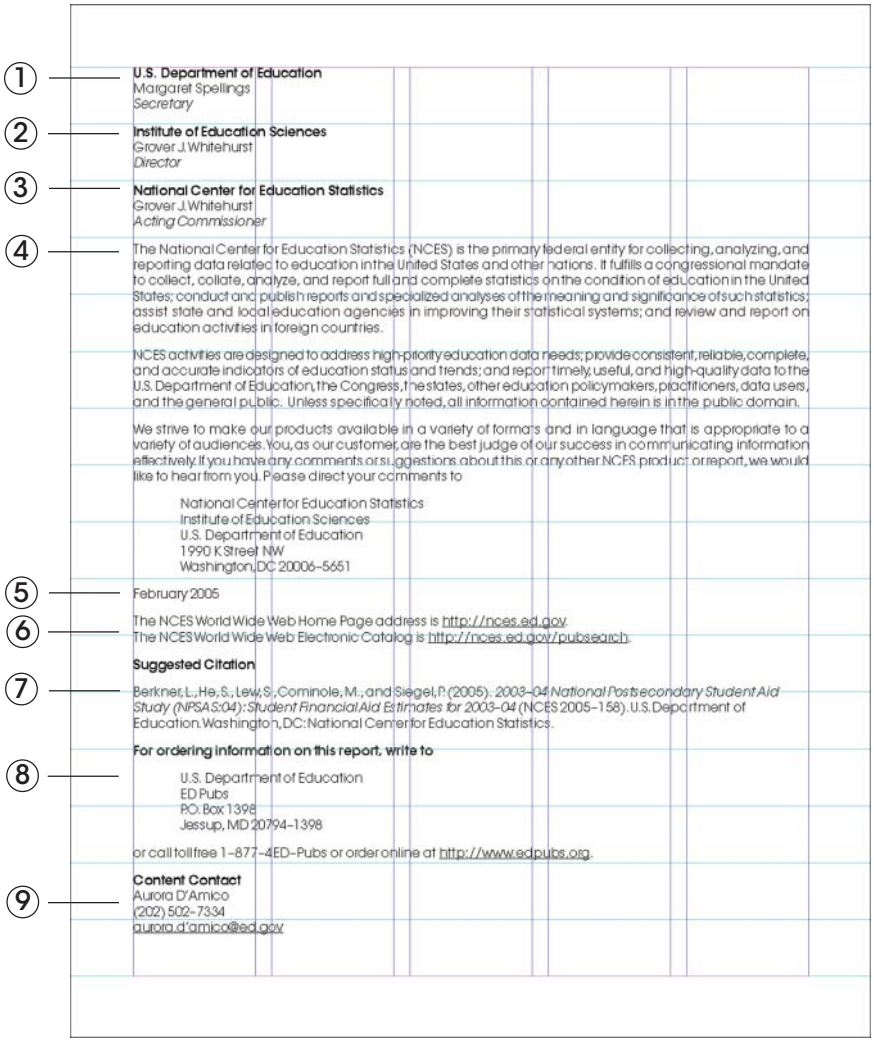
⑤ **Publication month and year** (usually, the month that the publication goes to the printer);

⑥ **NCES web addresses;**

⑦ **Suggested Citation** (follow the standard NCES style for a reference);

⑧ **EDPubs ordering information**; and

⑨ **Content Contact** (carry the name of the NCES project officer, telephone number, and e-mail address).



① **U.S. Department of Education**
Margaret Spellings
Secretary

② **Institute of Education Sciences**
Grover J. Whitehurst
Director

③ **National Center for Education Statistics**
Grover J. Whitehurst
Acting Commissioner

④ The National Center for Education Statistics (NCES) is the primary federal entity for collecting, analyzing, and reporting data related to education in the United States and other nations. It fulfills a congressional mandate to collect, collate, analyze, and report full and complete statistics on the condition of education in the United States; conduct and publish reports and specialized analyses of the meaning and significance of such statistics; assist state and local education agencies in improving their statistical systems; and review and report on education activities in foreign countries.

NCES activities are designed to address high-priority education data needs; provide consistent, reliable, complete, and accurate indicators of education status and trends; and report timely, useful, and high-quality data to the U.S. Department of Education, the Congress, the states, other education policymakers, practitioners, data users, and the general public. Unless specifically noted, all information contained herein is in the public domain.

We strive to make our products available in a variety of formats and in language that is appropriate to a variety of audiences. You, as our customer, are the best judge of our success in communicating information effectively. If you have any comments or suggestions about this or any other NCES product or report, we would like to hear from you. Please direct your comments to

National Center for Education Statistics
Institute of Education Sciences
U.S. Department of Education
1990 K Street NW
Washington, DC 20006-5651

⑤ February 2005

⑥ The NCES World Wide Web Home Page address is http://nces.ed.gov
The NCES World Wide Web Electronic Catalog is http://nces.ed.gov/pubsearch.

Suggested Citation

⑦ Berkner, L., He, S., Lew, S., Cominole, M., and Siegel, P. (2005). *2003–04 National Postsecondary Student Aid Study (NPSAS:04): Student Financial Aid Estimates for 2003–04* (NCES 2005-158). U.S. Department of Education. Washington, DC: National Center for Education Statistics.

For ordering information on this report, write to

⑧ U.S. Department of Education
ED Pubs
P.O. Box 1398
Jessup, MD 20794-1398

or call toll free 1-877-4ED-Pubs or order online at http://www.edpubs.org.

⑨ **Content Contact**
Aurora D'Amico
(202) 502-7334
aurora.d'amico@ed.gov

To access Microsoft Word templates for the standard title page format and boilerplate format for print or web-only publications, click on either title page/boilerplate templates—print or title page/boilerplate templates—web in the electronic version of this style guide.

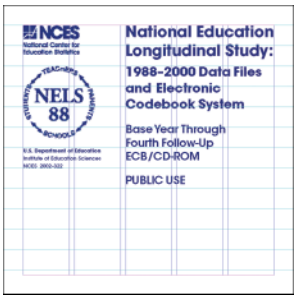
Other Types of Products

The following are examples of how the graphic standards have been applied to CDs and odd-size publications.

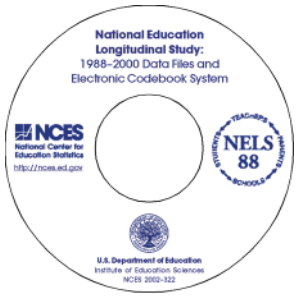
CDs (4.75″ x 4.75″)

CD covers and label should contain enough identifying information so that each piece stands alone. Front cover should contain the title, logos, restricted seal (if necessary), ED/IES identifier, and product number. Label includes the same elements as the cover, as well as the ED seal and NCES web address. Back cover carries NCES/ED/IES identifier, NCES web address(es), ED seal, and month and year. Photos and line art can be included in the background as long as they do not interfere with the text. When a CD is a companion to another product, colors and artwork should relate to each other.

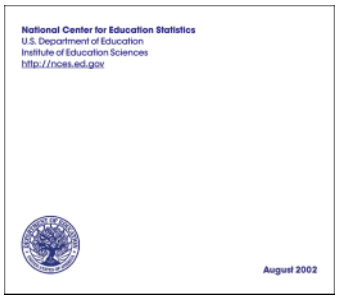
cover



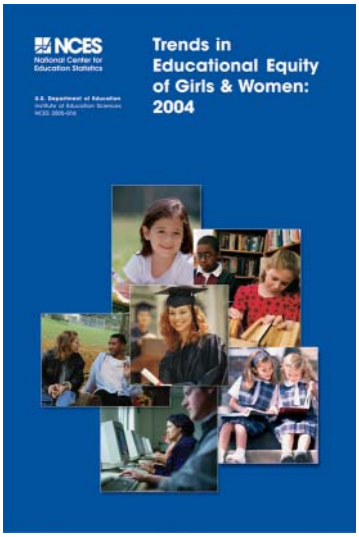
label



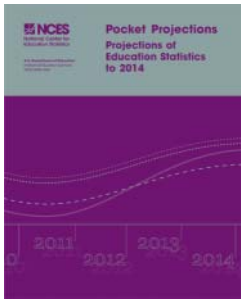
back



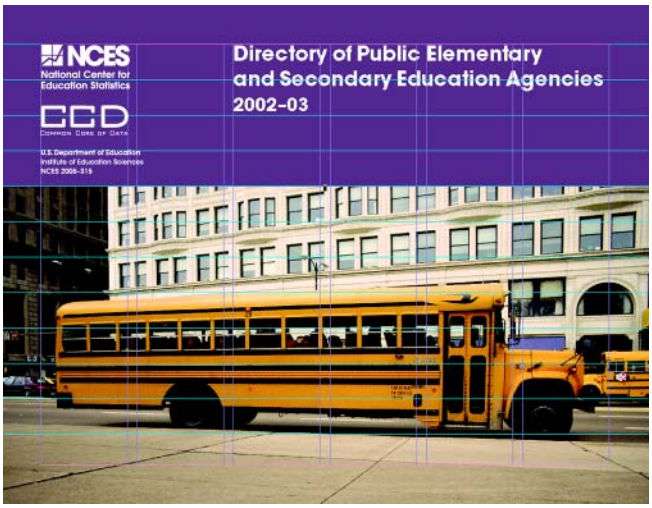
Small format (6″ x 9″)



Small format (4″ x 5″)



Horizontal (11″ x 8.5″)



Glossary

Baseline: An imaginary line on which the body of all letters rests.

Bleed: The layout, type, or pictures that extend beyond the trim marks on a page.

Boilerplate: This term refers to the back of title page. The boilerplate includes general information about the organization, the month and year a product is printed, a suggested citation, product ordering information, and the name of a person to contact with questions about the publication (content contact).

CMYK: An acronym for the four process colors: Cyan, Magenta, Yellow, and Black. (K stands for Black so that it is not confused for Blue.) Four-color process printing is the process of combining four basic colors (CMYK) to create a printed color picture or colors composed from four colors.

Font: A complete set of characters in a specific typeface. Examples include Avant Garde Gothic Bold and Avant Garde Gothic Demi.

Grid: A pattern of horizontal and vertical lines forming rectangles of uniform size used to organize graphic and typographic elements in a layout.

Gutter: The term gutter can apply to (1) the unprinted space in the center between the left and right pages; and (2) the white space between columns of type.

Logo/Logotype: The symbol created to identify an organization, company, or product that is set in a distinctive style and usually includes color selections that are used consistently.

Masthead: Think of the masthead as the "credit box," which includes the publication name, sponsoring organization, and other identifying information.

PMS: The abbreviated name of the PANTONE Matching System, a system of formulated ink colors used for communicating color. Also known as PMS Colors.

Reverse: An image that is the color of the paper (white), not that of the ink. This image is defined by the surrounding ink.

Spine: The bound edge of a publication.

Tint: A shade of a single color or combined colors.

Typeface: A style of type. Examples of typefaces include Avant Garde, Times Roman, Courier, and Helvetica. One typeface includes all the various fonts in that style, such as bold, italic, roman, or regular.

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