CLIR Style Guide

1. Introduction

The *CLIR Style Guide* will assist staff and consultants in writing and editing CLIR publications. It identifies rules for providing a consistent and professional look. The guide is arranged in three sections:

1. **Introduction**
2. **Notes to Authors and Editors**
3. **Style: Quick Reference**

Our style rules are based predominantly on *The Chicago Manual of Style, 16th Edition.* Since many of our publications contain computer terminology, we also use the *Microsoft Manual of Style, Fourth Edition.* In matters of style, *Chicago* rules, but if there is a difference of opinion on the same subject, you should make a decision based on the intended audience for the publication (that is, defer to the *Microsoft Manual* if you are targeting a predominantly technical audience). Above all, you should be consistent in your application of any rule throughout a publication.

A standard dictionary is essential to writing and editing work. Different dictionaries may treat the same words differently in their meanings, hyphenations, and acceptable use. We use *Merriam Webster's Collegiate Dictionary*, *Eleventh Edition.*

Two excellent references on writing that cover questions of use, meaning, grammar, and punctuation are *The Careful Writer* by Theodore Bernstein, and *The Elements of Style* by Strunk and White.

2. Notes to Authors and Editors

Text Submission Guidelines

- Submit files in Microsoft Word.
- Use single line spacing for text, and double line spacing between paragraphs.
- Use single spaces between sentences, not double.
- Do not use a first-line indent at the start of each paragraph.
- Indicate italics, bold, lower case, caps, heads, and subheads where appropriate. Extensive text formatting is discouraged since we usually reformat in a page layout program.
- Include a table of contents that clearly shows the hierarchy of headings and subheadings as they appear in the text.
- Any illustrations (charts, graphs, maps, logos, and photos) must accompany the original manuscript. They must be high quality, high resolution, and submitted separately from the manuscript. Be sure to indicate where illustrations should be placed in text.
- References to other works, if used, must be complete. See pp. 12–13, *source citations*, for examples of how to treat different types of references.

Title

Give careful thought to the title of your publication. A good title contains key words that make it easy for a reader to decide whether the publication is of interest. A good title is also as short as possible and stripped of detailed information, such as the dates or location of a conference or workshop.

Introductory Material

A CLIR staff member usually writes a preface for each report indicating the purpose and scope of the study and its significance to work in the field. The author should provide a brief introduction and background section at the beginning, giving an overview of what the report covers. This section should be written in a way that nonspecialists will understand as the audience may include the academic community, policymakers, and in some cases, the press and the informed public. The author should provide one paragraph of biodata for inclusion in the front matter. The author may also include acknowledgments if desired.

Chapter Openings and Headings

CLIR requires text between chapter heads and first-level headings, and between first- and second-level headings. There should be at least two or three sentences introducing the sections or subsections to follow. Logic also requires that there be at least two headings of the same level in any section or subsection.

Distinctive Treatment of Words

Use italics to denote a word referred to as a word or term, at least the first time it appears. For example, "The terms *authentication, authorization*, and others associated with access management are defined in Appendix D."

Reduce as much as possible the use of quotation marks for emphasis or irony.

Formality

CLIR style, while not purely scholarly, is formal in tone. For example, authors should avoid contractions (*didn't, won't*) and words conveying a spoken or less formal style.

References and Source Citations

References are indicated using *Chicago's* author-date system of documentation; that is, parenthetical author-date references in the text and a corresponding reference list. The author is responsible for the accuracy and completeness of all references cited.

See *source citations* in the Quick Reference section for further information; and *Chicago, ch.15*.

Use footnotes for comments or asides only.

Permissions

The author is responsible for obtaining all permissions that may be required to reproduce any illustrations or to reproduce or quote from any previously published material. Permissions must be obtained in writing and should be submitted with the manuscript.

Person, Tense, and Voice

Editors are experts in bringing consistency in person—we (first person) or the team (third person); and tense, present or past; and in maintaining the active voice as much as possible in a manuscript. However, both author and editor will save time if a conscious decision about these matters is taken at the time the document is written and is followed throughout the drafting stage. Use the first person in preference to terms such as "the present writer," that is, use "I" or "we" if more than one author. "We" should never be used to refer to a single author or to the author and the reader. Occasional use of "we" to refer to humanity, the nation, or the library or academic community as a whole is acceptable.

Tables and Illustrations

See *tables and illustrations* in the Quick Reference section.

Website Addresses (URLs)

CLIR prefers to avoid references to website addresses in narrative text. Such a reference should serve some purpose other than simply pointing to a source for further information or providing the URL of an institution mentioned in the text. In principle, URLs should appear only in reference lists, preceded by "Available at."

For electronic sources in reference lists, add the URL following the full facts of publication, per *Chicago 15.4*. Internet document citations match the model of print publications where possible.

You must provide as complete a citation of Web-published works as you would for works in print.

Hyphenation

Hyphens may be omitted in all cases where there is little or no risk of ambiguity or hesitation. For example:
>*The document was printed on machine-made paper.*
>BUT *The paper was machine made.*

3. Style: Quick Reference

a and **an**

>Before a pronounced *h*, long *u* (or *eu*), and such a word as *one*, the indefinite article should be *a*:
>>*a historical study, a hotel*
>>BUT *an honor, an heir*

acknowledgment (no *e* between *g* and *m*)

acronyms (and abbreviations)

>Spell out acronyms and abbreviations the first time they are used in each chapter. This does not mean the full name can never be used again; sometimes it is helpful to the reader to spell it out again.

add-on

and/or

>We agree with BERNSTEIN that *and/or* is *"a visual and mental monstrosity"* and with STRUNK AND WHITE that it is *"a device or shortcut that damages a sentence."* Where the choice of one conjunction or the other will not work, the solution is to write out in plain English, *x, or y, or both*.

apostrophes

>*three Rs* (not *three R's*)
>*1920s* (not *1920's*)
>PCs (not PC's)
>See also, *possessives*

appendix, appendixes (do not use *appendices*)

approximately

>Use *about* unless actual approximation procedure has been used.

back up (v), **backup** (n)

bandwidth

bibliographies, see *source citations*

bitmap

bits per second

>Spell first mention, but then abbreviate to *bps*. If you are sure the audience knows the term, you do not need to spell it out.

bit stream

black-and-white (adj)
>Before noun (*black-and-white photograph*); **black and white** after noun (*shown in black and white*).

Board
>Always use cap when referring to CLIR's *Board*

capitalization
>TITLES AND OFFICES
>>Use lower case except when the title immediately precedes name.
>>
>>>*the provost*
>>>*head of the library department*
>>>*Charles Henry, president of CLIR*
>>>*director of DLF*
>>>*Professor Peter Norsag*
>>>*Marcello Sonata, professor of music*
>>>*Virginia Betancourt is the national librarian of Venezuela and the executive secretary of the Association of Iberoamerican Libraries*
>
>ORGANIZATION NAMES
>>Capitalize full organization names but not shortened versions:
>>*Digital Library Federation; the federation.*
>
>*the* or *The* in ORGANIZATION NAMES
>>Use cap when using full name, *The Beinecke Rare Book and Manuscript Library*, lower case when using shortened name, *the Beinecke*.
>>
>>Down *t* for the following unless at the beginning of a sentence:
>>>the Board
>>>the Commission on Preservation and Access
>>>the Council on Library and Information Resources (CLIR alone does not use *the*)
>>>the Digital Library Federation (DLF alone does not use *the*)
>>See also *foundations and important contributors* for use of *the* or *The*
>
>BOARD
>>Always use cap when referring to CLIR's *Board*

catalog (not *catalogue*)

CD
>Not *CD disk*
>*CDs* (plural)

CD-ROM

centuries
>Spell out when used in text
>*fourteenth century* (not *14th century*)

client/server
>Use the slash mark.

CLIR

Stands alone as an acronym. Do not use *the* in front of it.
CLIR commissioned a survey of recent literature. But,
The Council on Library and Information Resources commissioned a survey of recent literature.

commas

Use the serial comma.

compare to, compare with

From BERNSTEIN, P. 111.

> The choice of *to* or *with* to follow *compare* is not a matter of indifference. When the purpose is to liken two things or to put them in the same category, use *to*. When the purpose is to place one thing side by side with another, to examine their differences or their similarities, use *with*. The choice of the preposition was erroneous in each of the following examples: "The economy can be compared with [to] a runner who is coasting to get his second wind for another sprint"; "Compared to [with] the $4,900,000,000 the Administration has proposed for foreign aid, the cost of the overseas reactor program will be small."

See also, *The Elements of Style* by STRUNK AND WHITE, P. 43.

context-sensitive

criteria

The singular is **criterion**: *One criterion of success is….*

cut-and-paste

data (n) always plural

database (a compound) vs. **data set** (two words)

DC

No periods.

deaccession

decision makers (no hyphen)

degrees

Omit periods in abbreviations of academic degrees, see *Chicago 10.20*.
BA, MA, MBA, PhD

digital-based (adj)

DLF

Refer to it as *DLF* in normal writing.
DLF commissioned a survey of recent literature.

double-click

dpi

due to
> Don't use it as a prepositional phrase. Use *because of*, *owing to,* or *through* instead. See Bᴇʀɴsᴛᴇɪɴ, ᴘ. 152 or Sᴛʀᴜɴᴋ ᴀɴᴅ Wʜɪᴛᴇ, ᴘ. 45.

e-mail
> Use hyphen. Do not use *e-mails* for plural, use *e-mail messages*.

end user (n), **end-user** (adj)
> Avoid; use *user*, *customer*, or *you* instead.

film-based (adj)

flatbed (scanner)

follow up (v), **follow-up** (n, adj)

footnotes
> Use numbered notes at the foot of the page for comments or asides only. See *source citations* for formatting references to works.

foundations and important contributors
> Full names and spellings are below. If *The* is part of the full name as shown, it should always be included and must have a cap, even in the middle of a sentence.

> > *The Alfred P. Sloan Foundation*
> > *The Andrew W. Mellon Foundation*
> > *The Brown Foundation, Inc.*
> > *EDUCAUSE*
> > *Howard and Mathilde Rovelstad*
> > *Institute of Museum and Library Services*
> > *Library of Congress*
> > *David Rumsey*

foreign words
> Isolated foreign words and phrases may be set in italics if they are likely to be unfamiliar to readers.

> Familiar words and phrases in a foreign language should be set in roman type.
> > fait accompli, raison d'etre, a priori

FTE
> Spell out the first time used. *Full-time equivalent* or *full-time employee*.

full time (adv), **full-time** (adj)

GB, abbreviation for *gigabyte*

gigabyte, abbreviate as GB.
> Spell out in straight text. Use abbreviation with numerals.

gray scale (n, predicate adj, and adj following n), **gray-scale** (adj preceding n)

hard copy (n), **hardcopy** (adj)

high-resolution (adj)

hyphens
> *decision maker*
> *vice president*

illustrations see *tables and illustrations*

initials
> The space between initials should be the same as the space between initial and name
> *R. W. B. Lewis*, not *R.W.B. Lewis*

Internet

intranet, extranet

italics
> Use for titles of works cited and for emphasis.

JPEG

KB, abbreviation for *kilobyte*

kilobit
> Always spell out, do not abbreviate to *Kbit*.

kilobyte
> Abbreviate to *KB*.

Listserv

logos
> Logo image files for CLIR and DLF are available on our P: drive for use by CLIR staff (**../public/Publications Archive/Logo image files_CURRENT**). If you are not a staff member, please contact us to obtain the specific logo you need. Images are provided in a variety of resolutions for web and print. Generally, select a file with a .jpg extension since it is common and easy to use for most needs. You may need a file in vector format—vector lets you resize an image to a larger size without distortion. Vector files on our P: drive end in .eps (encapsulated postscript) or .ai (Adobe Illustrator). Some formats support a transparent background instead of white; those formats are .eps, .png, .ai, .psd, .tif. Files in .jpg format do not support transparency.
>
> *CLIR staff:* **If there is a file or format you need and you don't see it, ask Brian.**

MB, abbreviation for *megabyte*

megabyte
> Abbreviate to *MB*.

metadata
> Treat as plural.

macro, micro
> Generally not hyphenated when used as prefixes.

money

Isolated references to amounts of money in U.S. currency are spelled out or expressed in numerals in accord with the general rules for numerals. If the number is spelled out, so is the unit of currency, and if numerals are used, the symbol $ or ¢ is used:

The fare has been raised to 25¢ (or $.25).
Hundreds of collectors paid five dollars each to attend the event.

Other currencies:
When letters other than symbols are used, a space separates the letter(s) from the numeral:

forty euros = EUR 40, or €40
725 yen = ¥725

multi

Generally do not hyphenate words beginning with *multi*

non

Generally not hyphenated as a prefix: *nonprint, nonprofit*

numbers

In text, spell out whole numbers from one to nine. Numerals are used for all other numbers. *Chicago 9.3.*

Very large numbers may be expressed in numerals followed by million, billion etc.
By the end of the fourteenth century, the population of Britain had reached 2.3 million.

Numbers applicable to the same category should be treated alike within the same context; do not use numerals for some and spell out others.
The project required 2 camera operators during the first year; 6 operators the second year; and 18 in the third year.

At the beginning of a sentence any number that would ordinarily be set in numerals is spelled out, regardless of any inconsistency this may create.
One hundred men and 103 women will receive degrees.

If an abbreviation is used for the unit of measure, the quantity should always be expressed as a numeral.
16 MBps network

online, **offline**

onsite, offsite

onscreen

papermaking

PCs

part time (adv), **part-time** (adj)

percent

Write it out when used in text, do not use % unless in tabular matter.

possessives
    Burns's poems (not *Burns' poems*)
    Library of Congress's books (not *Library of Congress' books*)

punctuation
    COMMAS
        Use the serial comma: *Larry, David, and Alice spoke*
        James Adams Jr. died   (no comma preferred)

    QUOTATIONS
        Run short quotations (up to eight lines) into the text and enclose them in quotation marks. Long quotations or extracts should be indented in a separate paragraph block without quotation marks. Place comma inside closing quotation marks: "this," rather than "this", is correct. But there are rare cases when the period should be placed after the quotation mark.

    QUOTE MARKS AROUND WORDS
        Chicago allows for quotes when a standard technical term is used in a nonstandard way and for words used in an ironic sense. We feel the emphasis should be on the *Chicago* qualification, "Such use of quotation marks should always be regarded as a last resort, to be used when the irony might otherwise be lost. Skillfully prepared for, an ironic meaning seldom eludes the reader even though quotation marks are not used." We extend this to the use of most nonstandard uses of words.

    VERTICAL LISTS
        Use numbers for items in a list only when numbered points are discussed in the text, or when the list contains a sequence.

        Use a period without parentheses after numerals or letters used to enumerate items in a vertical list:
            1. the Bay of Pigs
            2. the Berlin Airlift

        Numerals or letters enumerating items in a list within a paragraph should be enclosed in parentheses and should not be followed by a period.

        Omit periods after items in a vertical list unless one or more of the items are complete sentences. If the vertical list completes a sentence begun in an introductory element, the final period is also omitted unless commas or semicolons separate the items in the list:
        The following metals were excluded from the regulation:
            molybdenum
            mercury
            manganese

        After careful investigation the committee was convinced that
            1. the lawyer had consulted no one before making the decision;
            2. the chair, Smith, had never spoken to Watson;
            3. Smith was as surprised as anyone by what happened.

        If the vertically listed items are phrases, especially long phrases, that grammatically complete the sentence containing them, commas may, but need not, be used. If commas are used, the last item is followed by a period.

A colon should not be used to introduce a list that is the complement or object of an element in the introductory statement.

read-only (adj)

real-time (adj)

seasons

Lower cased: *spring*, *fall* etc.

setup (n), **to set up** (v)

source citations

CLIR uses Chicago's author-date system for citations and references. Basic elements are covered below, but you must reference *Chicago (ch.15)* for issues not mentioned.

The author-date system comprises two parts: the text citation, usually enclosed in parentheses, and a corresponding reference list. Only brief identifying information is provided in the text and full documentation is provided in the reference list.

The citation in the text consists of the author's last name and the year of publication of the work, in parentheses. If no author is listed, use the name of the organization publishing the information:

(American Sociological Association 2008)
(Annas and Elias 1999)
(Asher and Jahnke 2013)
(Balduzzi et al. 2012)
(Beecher 1966)

The citation should be placed where it offers the least resistance to the flow of thought, usually just before a punctuation mark.

It is not surprising, therefore, that researchers expressed uncertainty about the best procedures for adopting data management protocols and making decisions regarding appropriate data access (Asher and Jahnke 2013).

A corresponding reference list should appear in alphabetical order at the end of the report. As an example using the above citations:

American Sociological Association. 2008. *American Sociological Association Code of Ethics and Policies and Procedures of the ASA Committee on Professional Ethics.* Washington, D.C. doi:10.1111/j.0028-1425.2007.ethics.x.

Annas, George J., and Sherman Elias. 1999. Health Law and Ethics Thalidomide and the Titanic: Reconstructing the Technology Tragedies of the Twentieth Century. *American Journal of Public Health* 89 (1): 98–101.

Asher, Andrew, and Lori M. Jahnke. 2013. Curating the Ethnographic Moment. *Archive* 3 (Summer). Available at http://www.archivejournal.net/issue/3/ archives-remixed/curating-the-ethnographic-moment/

Balduzzi, Marco, Jonas Zaddach, Davide Balzarotti, and Sergio Loureiro. 2012. A Security Analysis of Amazon's Elastic Compute Cloud Service. In *Proceedings of*

the 27th Annual ACM Symposium on Applied Computing, 1427–1434. New York: Association for Computing Machinery.

Beecher, H. K. 1966. Ethics and Clinical Research. *New England Journal of Medicine* 274 (24): 1354–1360.

If a specific page or volume is cited, it follows the date in the citation and is preceded by a comma. When reference to both volume and page number is required, a colon separates them. A reference to a volume as a whole, without page number, requires *vol.* for clarity:
(Waters 2006, 42)
(Henry 1998, 3:114)
(Graham 2012, vol. 2)

Titles of works should be capitalized in headline style per *Chicago.*

Titles of books and periodicals are italicized. Titles of chapters, articles, and other short pieces are set in roman type without quotation marks.

As in bibliographies, a 3-em dash can replace the name of the author, editor, compiler, or translator for successive works attributed to the same person.

spaces

Use single spaces between sentences in text, not double spaces.

The space between initials should be the same as the space between initial and name *R. W. B. Lewis*, not *R.W.B. Lewis*.

stand-alone (adj)

state names

In running text, the names of states, territories, and possessions of the United States should always be spelled out when standing alone and preferably (except for DC) when following the name of a city: for example, "Lake Bluff, Illinois, was incorporated in 1895." In bibliographies, lists, tabular matter, and mailing addresses, they are usually abbreviated. *Chicago* now prefers the two-letter postal codes to abbreviations. *Chicago 10.28.*

tables and illustrations

Tables and illustrations preferably should be no larger than 6.5 by 9 inches in order to fit CLIR's print report format. Larger tables and figures may be reduced to fit.

Any illustrations (charts, graphs, maps, logos, and photos) must accompany the original manuscript. They must be high quality, high resolution, and submitted separately from the manuscript. Indicate placement of illustrations within text, either with captions in brackets or with low-resolution versions of the graphics.

Tables are set in type whereas illustrations are typically reproduced from artwork or a graphics software package.

Every table and illustration should be given a number and should be cited in the text by that number, either directly or parenthetically. Tables and illustrations are separately numbered. Illustrations are referred to as *figures*. Use Arabic numerals:
The sequence of events that must work in order for the emulation approach to allow an obsolete digital document to be read is illustrated in figure 2.

He presented a diagram to illustrate the elements of access management (figure 2).

If these assumptions are true, the changes in unit costs are remarkable (table 4).

Titles of tables and illustrations should be typed using sentence-style capitalization. No period should follow the title. "Figure" should be abbreviated to "Fig." with a period placed after the figure number when a caption follows.
Fig. 2. An encapsulated digital document
Table 4. Projected costs per volume over 10 years

See *Chicago* for discussion on handling illustrations and captions, and for discussion on formatting tables. CLIR style allows great latitude in the appearance of tables. The important issue is to apply consistency in appearance and labeling among all tables within a publication.

that vs. which
From *The Elements of Style* by Strunk and White, p. 59.
That is the defining, or restrictive pronoun, *which* the nondefining, or nonrestrictive.

The lawn mower that is broken is in the garage. (Tells which one.)
The lawn mower, which is broken, is in the garage. (Adds a fact about the only mower in question.)

See also *The Careful Writer* by Theodore Bernstein, p. 443.

TIFF (Tagged Image File Format)

timeframe

time zones
When spelled out, are lower cased.
daylight saving time (DST)
eastern standard time (EST)

trade-off

titles, "Dr."
Use **Dr.** only for qualified medical people, unless the correct alternative is not known or it would seem perverse to use **Mr.** (e.g., Dr. Martin Luther King).

under way (adv), **underway** (adj)

US, USA
No periods. See *Chicago 10.33.*

Use abbreviations only when used as a modifier: *US politics*; spell out when used as a subject or object: *The United States has vast natural resources.*

vice president (no hyphen)

website (no initial cap)**, webpage, the Web, or World Wide Web**

workflow

workgroup

workstation

x (by)

Acceptable in *600 x 600 resolution*, but use *81/2 by 11 inch paper*.

x-ray (v), **X ray** (n), **X-ray** (adj)

%, see percent