
Conservation Applied Research & Development Report Format and Content Guidelines

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Overview

Unless a specific exception is made, the Minnesota Department of Commerce, Division of Energy Resources (Department) requires the following minimum written deliverables from research projects conducted under the Conservation Applied Research and Development (CARD) grant program:¹

- Final Report
- Executive Summary (Note: Unless otherwise directed by the Department, this item should be incorporated into the Final Report.)
- Policy Brief *may* sometimes be required as an alternative, or in addition, to the Executive Summary (Note: Unless otherwise directed by The Department, when required this item should be incorporated into the Final Report.)

All written materials submitted to the Department must meet the State's American's with Disability Act (ADA) accessibility standards for documents. In addition, they must be written in plain language that is clear, well-organized and easily understandable by State and utility staff as well as the general public. (Further information on ADA and plain language requirements is given in the second and third sections of these guidelines.) All final reports must use the Department's logo and official fonts for headers and body styles. A report template has been created with the Department's logo and official styles to simplify this process.

Note: In documents, the Conservation Improvement Program is abbreviated as CIP. If the reference is plural, it is typically stated as CIP offerings, or CIPs.

Section 1: Final Report Guidance

CARD Report Template

The Department has created a downloadable Word document template that includes two parts:

- Part one is a template for a two-sided cover page using the Department's logo and official fonts and header styles.
- Part two is a template formatted for the creation of the body of the final report itself using Department's official fonts and header styles.

The Template is a newer Word format which has a built-in Accessibility checker. The template as well as these Format and Content Guidelines can be downloaded from the "Grantee Info" tab of the [Applied Research and Development webpage](#) on Department's website. On the webpage and click the "Grantee Info" tab. Final report guidance is at the bottom of this tab including links to the CARD report Template.

The color palette of this template is as follows

- **Dark Blue Color Red/Green/Blue (RGB) = 0/56/101**
- **Light Blue Color Red/Green/Blue (RGB) = 0/77/141**

¹ Additional deliverables may be expected based on those specified by the Department in a particular RFP, recommended by the grantee in their proposal and/or incorporated into the final Scope of Work by mutual agreement.

The most straightforward approach is to write your report within the template itself. If you have text that needs to be pasted into the template from another source, make certain that the pasted text shows up as the correct style (e.g. “Normal” for the body of the report, proper heading styles for each level of heading, caption style for captions, etc.). Typically, using the “Keep Text Only (T)” paste options works best for this. However, “Merge Formatting (M)” may be a better option in cases where the text you want to paste is formatted in some way (e.g. as a bullet list, italicized) that you want to retain when it is pasted. It is a good idea to check the pasting with either option to see which works best for your situation.

Part One – Final Report Template Cover Page

The two-sided Cover Page template **must** be used for the cover of the CARD Final Report. **Yellow highlighting** in the cover page indicates information or text that needs to be input or updated. Once the correct data is entered, the highlighting should be removed. The cover page contains the proper Word document “styles” with the official fonts, colors, and sizes required for documents that come from the Department. (Note: For reference, the style name is noted in parenthesis after the first use of the style.)

Content of Side One of the Cover Page

Department logo for Energy Division

- Report title
- Report subtitle (if applicable)
- Date of Report
- Contract #
- Indication that report was written for Conservation Applied Research and Development (CARD) program and whether the report is an “Interim” **or** “Final” report
- Department of Department, Division of Energy Resources as entity the report prepared for
- Grantee name(s) as preparer(s) of the report
- Grantee logo(s), if desired

Note: **The template version number is in the footnote of page 1 of the template. Do not remove the template version number;** the Department’s project manager will remove it after confirming version number.

Content of Side Two of the Cover Page

- Name(s) of the primary author(s);
- Organization(s) the author(s) are affiliated with, including address, phone number (optional), web address (optional), and project contact (optional);
- Copyright statement (optional)
- Department contract number;
- Names of Commissioner of Department and the Deputy Commissioner, Division of Energy Resources;
- Name and contact information for Department’s project manager;
- Acknowledgments to
 - Department and CARD for funding this project
 - Any additional entities the grantee would like to recognize for project contributions
- Standard disclaimer

Part Two – Final Report Body Template

Part two is a template that **must** be used for creating the final report itself. A Word “section break” separates this part of the document from the Cover Page that precedes it. This section break should **not be deleted** as it will alter the margin and heading settings of the Cover Page.

The report template contains Word document “styles” that have the official fonts, colors, and sizes required for all documents that come from Department. It has the proper paragraph spacing to help eliminate the need for blank returns, which are problematic for ADA compliance.

The template also contains the default heading titles as outlined in the recommended content explained in the next section. In addition, the template contains examples of: figures, tables and table formatting; footnotes; and other named styles. All of the headings and examples use proper Word document “styles” with the official fonts, colors, and sizes required for documents that come from the Department. (Note: For reference, the style name is noted in parenthesis after the first use of the style.)

The template includes explanatory text and tips on ADA compliance which should be deleted after being read.

Content of CARD Final Report

Recommended Content²

The CARD Final Report typically includes the following sections:

- **Abstract** – concise, informative summary of report that is about 200 - 400 words in length and addresses the report’s purpose and major findings (e.g. conclusions, recommendations).
- **Table of Contents**
- **Executive Summary** – a one- to five-page summary that overviews the key results from entire CARD project report. The purpose is to encapsulate the larger content of the report in an understandable and accessible way for readers who may be too busy to read the report in detail. It is typically focused on important outcomes and recommendations and intended for broader publication and a wide-ranging audience that includes CIP staff and policymakers; utility program designers, managers, implementers, and researchers; and other CIP stakeholders as well as the general public. An Executive Summary generally consists of **succinct** versions of the following components and should include tables, graphs and figures as appropriate:
 1. Statement of the research question and its relevance;
 2. Summary of pertinent background information;
 3. Description of study methodology
 4. Outline of the results;
 5. Analysis and discussion of the results; and
 6. Presentation of conclusions and recommendations.

² Some projects may not lend themselves to a final report with this exact structure. Appropriate changes that have been discussed with the Department’s Project Manager can be made. Please, send a final report outline to your Project Manager for review and discussion prior to drafting the final report itself.

- **Policy Brief** – *when applicable*, a Policy Brief may be required *instead of*, or *in addition to* an Executive Summary. A Policy Brief is a one- to three-page document which articulates the research findings in terms of their implications for, or impact on, state energy policy and their specific application in Minnesota CIP. The primary audience for the policy brief should be Department Staff, state legislators, and other policymakers. It should be a translation of the research results into the application of those results within State CIP policy. A Policy Brief generally consists of *succinct* versions of the following components and should include tables, graphs and figures as appropriate:
 1. Statement of study purpose and its significance for energy policy in Minnesota;
 2. Summary of pertinent policy background and context;
 3. Brief description of study methodology;
 4. Outline of key findings related to energy policy in Minnesota generally, and in CIP more specifically;
 5. Analysis and discussion of implications of findings for energy policy and practice in Minnesota generally, and CIP more specifically;
 6. Presentation of recommendations as they apply to energy policy generally in Minnesota, and to CIP more specifically.
- **Introduction/Background** – provides adequate context to help the reader understand the research problem and how your project planned to address it, including:
 1. What technology, measure, or strategy does this study address?
 2. What previous research had been done in this area prior to your project?
 3. What gap(s) did this previous research leave and how does your project intend to address one or more of those gaps?
 4. Why were these gaps important to fill? In other words, what is the significance of your work or what is the expected impact of your work on our understanding of or resolution to the problem you outlined?
- **Methodology** – describes the research design or description of the original plan for the research, including:
 1. What specific question or questions did the project plan to answer?
 2. What data was intended to be collected?
 3. What methods were planned to collect the data?
 4. How was data integrity going to be maintained?
 5. How was the collected data going to be analyzed?
 6. Incorporate any deviation(s) to the original research design with an explanation of why the deviation(s) were required.
- **Results** – objective description or display of results obtained in the study; include tables and figures in addition to text when showing quantitative results. In addition, assign numbers to the tables and figures. Lengthy tables or other data structures should be included in an appendix with summary tables in the report itself as appropriate. The results should also describe and discuss any deviations from the research plan as outlined in the methodology section, including the reason(s) for and/or justification(s) of that deviation.
- **Discussion of Results** – thorough examination of the results presented in the previous section; include figures and tables as appropriate to the discussion and as aids to understanding the material.

- **Conclusions and Recommendations** – should be a synthesis (not simply a summarization) of the results and discussion in the previous two sections, and should be geared specifically toward utility CIP executives, utility CIP program managers, CIP service providers and Department CIP staff. Questions to consider include:
 1. How should the results be interpreted by the utilities for inclusion in their CIP programs?
 2. What lessons did you learn from carrying out this field study or implementing this research that would be useful to communicate to other utilities that are considering including this technology or applying this program strategy/approach in their CIPs?
 3. Is this technology or program strategy equally applicable to the portfolios of investor owned utilities, cooperative utilities and municipal utilities, or are there specific considerations based on each utility type?
 4. If the results of this study are satisfactory:
 - Are the results good enough to implement/offer the technology/strategy as part of CIP at this point? If yes, what are the next steps to implement?
 - Is a pilot project a better first step than full implementation at this point? If a pilot is warranted, what is it specifically that the pilot would need to test or verify before a full-fledge program could be implemented and how would you recommend setting up such a pilot?
 - Are further study and verification, or additional interpretation and refinements needed before this technology/strategy can be offered as part of CIP? If yes, what are they?
 - Is this technology/strategy universally applicable to all/most utilities in the state, or is it transferrable to only certain utilities and what are the criteria?
 - If the technologies are applicable to most/all utilities in the state are implementation differences among utility types/sizes foreseen?
 - What follow-up research (if any) would you recommend to expand on the findings of this study?
 5. If the results of this study are **not** satisfactory or inconclusive:
 - Are the issues inherent issues with the technology or strategy being studied?
 - Are the issues with the methodology of the study?
 - Are the issues related to sampling or data availability (e.g. is it poor, not adequate, not verifiable, etc.)?
 - Can the shortcomings of this study be corrected?
 - What could have been done differently or should be done differently in another study of the same or a similar technology/strategy?
 - Is this technology/strategy worth pursuing further or is it a dead end?
 6. What other alternatives or solutions became available or were developed during the course of the study? Are any worth pursuing instead or in addition to this technology/strategy?
 7. Do you have ideas or suggestions for completing a similar study more economically or in a shorter time frame?
 8. Do the results of this study change your assessment of the energy saving potential you reported in your original proposal and if so, in what way? If you think it is appropriate, consider updating the Savings Estimate Grid table from your original proposal, but this is **not** required (see Table 1 for reference).

Table 1. Example of Savings Estimate Grid

SAVINGS ESTIMATE GRID	Range for Total Number of Discrete Instances ▼	Low Savings Estimate per Instance Units	Most Likely Savings Estimate per Instance Units	High Savings Estimate per Instance Units
Range of Savings Estimate per Discrete Instance ►		50	75	100
Low Estimate of Total Instances (Item)	1,000	50,000	75,000	100,000
Most Likely Estimate of Total Instances (Item)	2,000	100,000	150,000	200,000
High Estimate of Total Instances (Item)	3,000	150,000	225,000	300,000

- **References** – list of references used in the CARD research project.
 1. The specific format used for the reference list is not fixed, but should be consistent with a standard, recognizable style manual such as:
 - The [Chicago Manual of Style \(CMS\)](http://www.chicagomanualofstyle.org/home.html)
(<http://www.chicagomanualofstyle.org/home.html>)
 - [Publication Manual of the American Psychological Association \(APA Style\)](https://www.apastyle.org/manual)
(<https://www.apastyle.org/manual>)
 - [Modern Language Association Handbook for Writers of Research Papers \(MLA\)](https://www.mla.org/Publications/Bookstore/Nonseries/MLA-Handbook-Eighth-Edition)
(<https://www.mla.org/Publications/Bookstore/Nonseries/MLA-Handbook-Eighth-Edition>)
 - Note: links to summaries of the CMS, APA and MLA Styles can be found [here](#) or at: https://owl.purdue.edu/owl/purdue_owl.html
 2. Internet Links should be included in the references when applicable. To meet ADA compliance, **attach web address as a hyperlink on a word or phrase that describes what the hyperlink is for**. If you want to *also* type out the hyperlink so that printed copies of the report show the link, this is acceptable but make sure the hyperlink is removed from the typed out address. If referencing an online article, include the digital object identifier (DOI) if available. The DOI is a permanent ID that, when appended to <http://dx.doi.org/> in the address bar of an Internet browser, will lead to the source. If no DOI is available, list a URL instead.
 3. Personal communications or e-mail messages should also be listed in the reference list if important to documenting a particular finding or supposition.

Optional Items

Additional items may be incorporated in the final report if appropriate, including but not limited to:

- Lists of Tables (especially if there are many)
- Lists of Figures (especially if there are many)
- Lists of Equations (especially if there are many)
- Definition of Terms
- Appendices

Section 2: ADA Compliance Guidance

All CARD final reports, executive summaries and policy briefs must meet the State’s ADA accessibility standards. The State of Minnesota Information Technology (MNIT) has free [Accessible Word eLearning](#) modules available and grantees are **strongly encouraged to take these trainings** prior to creating your documents, as many compliance issues are easiest to address *as the final report is written*. MNIT provides additional resources on its general [Accessibility webpage](#), including accessibility quick reference cards.

Please refer to these MNIT resources for detailed guidance, but this section contains some general guidance and links to additional resources that may also be helpful.

General Guidelines

Built-in Styles

- Use built-in styles in the CARD final report template³, including all of the headings required for your report, normal style, table styles captions, etc.;
- The title is Heading 1, and **Heading 1 should only be used for the title** and for nothing else in the document.
- The built-in styles contain the appropriate default paragraph spacing to help eliminate the need for blank returns, which are problematic for ADA compliance;
- If additional spacing is required around a specific figure or for some other reason, modify the spacing within the individual paragraph rather than adding a blank return.
- Use short titles in headings and captions whenever possible, but they should never be longer than one line; longer titles sometimes are truncated when read by readers for the sight impaired.
- Ensure all heading styles are in the correct order (i.e. don’t skip over a heading style level).

Create a Separate Alternative Text List

As you are composing alternative text for each table and figure in the final report, **copy the alternative text you created into a separate document as an “Alternative Text List.”** This separate listing of alternative text will be extremely useful when the Department completes the final ADA compliance stage of your final report since alternative text for all tables, and for a number of the figures, needs to be inserted in a supplemental location. The Department has created a document form you can use to create your alternative text list ([Xxxx_CARD-Report_Figure-Table-Alt-Text-List.docx](#)).³

Tables

- Add alternative text to all tables (under table properties, choose the alternative text tab). There are two fields in the Word dialogue box: Title and Description and they serve different functions.
 - The **“Title”** field is the same as a caption or label and provides a relevant and concise explanation of the table. If the table already has a caption (inserted using the “insert caption”

³ The CARD final report template and form for creating an alternative text list can both be downloaded from the “Grantee Info” tab of the [Applied Research and Development webpage](#) on the Department’s website.

function on the reference tab), you can leave the “Title” field blank as it is redundant. If the table does not have a caption, it is good practice to also add a title in case the Word document is ever read directly by a computer screen reader.

- The “**Description**” field is the important one as the description is passed to the PDF as **alternative text** while the title is lost.
- For a table the alternative text should:
 - Be something that a sighted reader might pick up in a visual skim of the information within the table – a high level summary. For instance something such as “Savings ranged from 8% to 30% with an average of 22%,” or “The fuel used for water heaters in the study buildings were a mix of fuel types, with 67% of buildings using natural gas, 26% electric, 5% propane and 2% other fuels.”
 - NOT use descriptive phrases such as “table showing...” as that is redundant. In creating alternate text, think about the main point(s) or data the table is displaying and try to summarize it succinctly.
 - Be **limited to 180 characters**.
 - One useful resource for writing alternative text is [Everything you need to know to write effective alt text](#).

Note: If the table is already summarized at a high level within the text of the report, it is acceptable to include a very short alternative text for the table, such as: “Summarizes the savings measured at individual sites as described in the text.”

- If a table is strictly for formatting purposes (e.g. to arrange two photos next to each other) use a set of close quotes (“”) as a stand-in for alternate text. This lets the screen reader know it can skip that table as there is nothing to “read.”)
- Use simple table structures (more complex structures are harder to “read” or navigate by the screen readers for the visually-impaired. In particular:
 - **Do not use nested tables** (one table placed inside another table). Nested tables are a type of complex table that cannot be made ADA compliant. You will be required to convert any nested tables to an un-nested table structure.
 - Do not merge row or column cells; instead add additional rows or columns to display data or break a single table into more than one table.
 - Avoid using blank cells within tables
- Provide the desired gap **between** table rows by attaching spacing “before” (or after) individual paragraphs within a table; or use change the row height using layout tab within table tools. Avoid using blank rows in tables to create this spacing.
- Use either alignment (right, left, center, or justified), or a *single* tab or space to provide the correct positioning of text within table cells; do not use multiple spaces or multiple tabs.
- Specify column header row(s) in tables, even if tables do not span more than one page (highlight header row and under table properties, choose the row tab and check the “Repeat as Header Row” box).
- Do not put tables inside text boxes; leave them as “Word Tables.”
- Do not copy tables into document as figures; whenever possible paste the table with formatting (or merge formatting) or create the table in MS Word to begin with.

- Use “insert caption” feature to create a caption for tables (highlight table and on References Tab, choose “Insert Caption”).
- Reference tables in the text by number using the cross-reference feature (on References Tab, choose “Cross-Reference” and insert the table you want cross-referenced). This has the added advantage of automatically updating as tables are added or moved around.

Figures, Photos and Objects

- Add alternative text to all figures (right click figure and choose “Format Picture,” then “Alt Text.” There are two fields in the dialogue box: Title and Description which serve different functions.
 - The “**Title**” field is the same as a caption or label and provides a relevant and concise explanation of the figure. If the figure already has a caption (inserted using the “insert caption” function on the reference tab), you can leave the “Title” field blank as it is redundant. If the figure does not have a caption, it is good practice to also add a title in case the Word document is ever read directly by a computer screen reader.
 - The “**Description**” field is the important one as the description is passed to the PDF as **alternative text** while the title is lost.
 - For a figure the alternative text should:
 - Be a clear and concise phrase that performs the same function and communicates the same information as the figure, graphic or image so that visually impaired people get the gist of non-text content.
 - NOT use descriptive phrases such as “picture of...” or “graph showing” as that is redundant.
 - Not necessarily describe the non-text content, but should serve the same purpose. In creating alternate text, think about the main point(s) or data the table is displaying and try to summarize it succinctly; think about why the non-text content is being used, what information it is presenting and what purpose it is fulfilling. If the figure is primarily about communicating data, try to summarize the data succinctly. If the figure is communicating something else, replace that non-text content with words that convey the same idea or mood or that tell the same story as the figure.
 - Be **limited to 180 characters**.
 - One useful resource for writing alternative text is [Everything you need to know to write effective alt text](#)

Note: If the data in a figure is already summarized at a high level within the text of the report, it is acceptable to include a very short alternative text for the figure, such as: “Individual bars show individual savings measured at each site as described in the text.”

 - If a figure is strictly for decorative purposes use a set of close quotes (“”) as a stand-in for alternate text. This lets the screen reader know it can skip that figure as there is nothing to “read.”)
- Do not put figures inside text boxes; leave as independent object.
- Place figures “in-line” with text; do not position with text wrapping as it creates floating figures.
- Do not overlay figures with text boxes, arrows, or lines. These types of objects need to float over the figure creating two ADA compliant problems: they cannot be made to be in-line with text and as

individual objects they each require alternate text. Instead, add such objects in the original program that created the graphic (e.g. Excel) and group them as one object there. If they cannot be grouped, one option is to paste the figure with overlaid graphics into the Word document as a “JPEG” picture, which essentially makes the graphic come in as ONE figure. Some loss of clarity will occur with this paste options so it is not ideal but in most cases it is acceptable.

- Use “insert caption” feature to create a caption for figures (highlight figure and on References Tab, choose “Insert Caption”).
- Reference figures in the text by number using the cross-reference feature (on References Tab, choose “Cross-Reference” and insert the table you want cross-referenced). This has the added advantage of automatically updating as figures are added or moved around.

Other

- Avoid using repeated blank characters. For example:
 - Provide the desired gap **between** paragraphs by attaching spacing “before” (or after) paragraphs as part of the “Normal” style (or on individual paragraphs when more space is required around graphics) rather than by using multiple blank returns.
 - Delete any blank spaces at the end of paragraphs.
 - Delete multiple tabs or spaces within tables
- Use hyperlink text that is meaningful. In other words don’t type out the web address; instead attach the web address as a hyperlink on a word or phrase that says or describes what the hyperlink is for. If you want to **also** type out the hyperlink so that printed copies of the report show the link, this is acceptable but the actual hyperlink needs to be removed from this text.
- Avoid image watermarks.
- Avoid using text boxes whenever possible.
- Avoid blank returns (document readers often get confused by blank returns and erroneously conclude that it is the end of the document). Instead, modify the normal and heading styles to provide the needed paragraph spacing.

Additional Resources

Your primary reference for ADA compliance should be the MNIT [Accessibility webpage](#). In addition, Microsoft Word 2010 and newer has a built-in accessibility checker that can be used to evaluate whether or not specific accessibility issues have been addressed. The checker also indicates where in the document each accessibility issue is located. This is a very helpful tool in creating assessable documents.

More detailed information on accessibility for Word documents, including how to address the issues outlined in the general guidelines above, is available in the article “[Make your Word documents accessible to people with disabilities](http://office.microsoft.com/en-us/word-help/creating-accessible-word-documents-HA101999993.aspx)” (<http://office.microsoft.com/en-us/word-help/creating-accessible-word-documents-HA101999993.aspx>) on Microsoft’s website.

Another worthwhile web reference is [Penn State’s Accessibility site for MS Office products](http://accessibility.psu.edu/microsoftoffice/) (<http://accessibility.psu.edu/microsoftoffice/>), which includes a useful page on [Charts & Accessibility](http://accessibility.psu.edu/images/charts/) (<http://accessibility.psu.edu/images/charts/>) and another one on [Math and STEM content](http://accessibility.psu.edu/math/) (<http://accessibility.psu.edu/math/>).

For useful information on creating webinar slide sets that meet ADA accessibility requirements, see the Microsoft article "[Make your PowerPoint presentations accessible to people with disabilities.](#)"

For useful information on creating Excel spreadsheets that meet ADA accessibility requirements, see the Microsoft article "[Make your Excel documents accessible to people with disabilities.](#)"

Section 3: Plain Language and Gender-Neutral Language Guidance

Plain Language Guidance

All state agencies are required to: use language commonly understood by the audience; write in clear and complete sentences; and present information in a format that is easy-to-find and easy-to-understand. CARD reports, executive summaries, and policy briefs should comply with these requirements.

Plain language is not just an issue for people who struggle with reading or have a reading disability. It is a problem for everyone, including people who are highly literate. In part this is because people often have limited time to read and when they take the time they tend to scan, not read. As a result, everyone wants to understand the important points in written materials quickly.

The Plain Language Action and Information Network (PLAIN) describes plain language as any “communication your audience can understand the first time they read or hear it.”⁴ PLAIN goes on to say that plain language is defined by results, more than technique: if “it is easy to read, understand, and use” it is plain language.

Some basic tips on plain language include:

- Think about the audience of the report and what is essential to communicate to that specific audience.
- Identify for yourself the main message(s) you want to communicate in the report (and in each section of the report, and even in each paragraph) and review what you have written with that in mind.
- Keep the language clear, concise and simple, including
 - Replacing complicated or large words with simpler, shorter words that mean the same thing.
 - Dropping redundant or unnecessary words.
 - Using more full stops (i.e. periods) and fewer commas and brackets.
- Write in active voice.
- Use personal pronouns (I, me, we, you)
- Use shorter sentences (15 to 20 words on average is a typical recommendation).
- Use bullet or numbered lists instead of long lists within sentences.
- Use the rule of one sentence per one idea.
- Use a new paragraph for each new concept.
- Ideally, keep the length of paragraphs to three to six sentences.
- Use headings and subheadings to organize text.
- Use lists, tables and figures when possible to display data and information.
- Use highlighting, bold and italics sparingly.
- Clearly define jargon or acronyms that might not be understood by everyone who will read the report, or avoid them completely if possible. If there are a lot of specialty terms, consider creating a definition section of the report that can be referenced by the reader.
- Give links a meaningful name that gives the user information, rather than simply providing the link address.

⁴ Plain Language Action and Information Network. “[What is Plain Language?](https://plainlanguage.gov/about/definitions/)” Accessed May 20, 2021, (<https://plainlanguage.gov/about/definitions/>).

The U.S. federal government’s [PLAIN Language website](http://www.plainlanguage.gov/) (<http://www.plainlanguage.gov/>) contains useful information and resources for plain language writing including:

- Kimble, Joe, 2002. “[The Elements of Plain Language](https://plainlanguage.gov/resources/articles/elements-of-plain-language/)” Accessed May 20, 2021 (<https://plainlanguage.gov/resources/articles/elements-of-plain-language/>)
- [Checklist for Plain Language](https://www.plainlanguage.gov/resources/checklists/checklist/), Accessed May 20, 2021 (<https://www.plainlanguage.gov/resources/checklists/checklist/>)
- [Mary Dash’s Writing Tips](https://www.plainlanguage.gov/resources/articles/dash-writing-tips/), Accessed May 20, 2021 (<https://www.plainlanguage.gov/resources/articles/dash-writing-tips/>)
- [Plain English: At a Glance](https://www.plainlanguage.gov/resources/articles/at-a-glance/) Accessed May 20, 2021 (<https://www.plainlanguage.gov/resources/articles/at-a-glance/>)
- [Federal Plain Language Guidelines](https://www.plainlanguage.gov/guidelines/)” Accessed May 20, 2021 (<https://www.plainlanguage.gov/guidelines/>)

In addition, the Securities and Exchange Commission publishes “A Plain English Handbook” which, while written for the finance industry, contains well-established techniques for writing in plain English that are useful to anyone.⁵

Other plain language resources that may be helpful include:

- The Center for Plain Language publishes a [Plain Language Checklist](http://centerforplainlanguage.org/plain-language-checklist/), Accessed May 20, 2021 (<http://centerforplainlanguage.org/plain-language-checklist/>).
- The Model Systems Knowledge and Translation Center has developed a [Writing and Testing Plain Language Tool](http://www.msktc.org/lib/docs/KT_Toolkit/MSKTC_Plain_Lang_Tool_508.pdf), Accessed May 20, 2021 (http://www.msktc.org/lib/docs/KT_Toolkit/MSKTC_Plain_Lang_Tool_508.pdf) which describes how to test the grade level at which text is written.
- A YouTube video on [Writing Science in Plain English](https://www.youtube.com/watch?v=Mn7f5tsgjx8), Accessed May 20, 2021 (<https://www.youtube.com/watch?v=Mn7f5tsgjx8>) demonstrates how to write about science in plain English by following twelve simple rules.⁶

Gender-Neutral Language Guidance

While it may not be an issue in most cases, when authoring a final report or other written deliverables for CARD projects, avoid the use of gender-specific language, such as “he,” “she,” “his,” and “her.” Instead use nongender-specific nouns and pronouns whenever possible.

Examples of possible substitutes for gender-specific nouns are shown in the table below.

Gender-Specific Noun	Possible Substitute
Businessman	Businessperson
Chairman	Chair

⁵U.S. Securities and Exchange Commission (SEC), 1998. “[A Plain English Handbook: How to create clear SEC disclosure documents](https://www.sec.gov/pdf/handbook.pdf),” Office of Investor Education and Assistance, SEC, 450.5th Street, NW, Washington, DC 20549m. Accessed May 20, 2021, (<https://www.sec.gov/pdf/handbook.pdf>).

⁶ A written summary of these guidelines, entitled [How to Write Plain English](http://www.praxiom.com/Dr-Lynn-Dicks.pdf) (<http://www.praxiom.com/Dr-Lynn-Dicks.pdf>), is also available, but lacks the useful examples and details outlined in the video.

Gender-Specific Noun	Possible Substitute
Crewman, crewmen	Crew member, crew
Congressman	Legislator, congressional representative
Foreman	Supervisor
Man, male	Person, individual, human
Man hours	Person hours, hours worked, worker hours
Man-made	Synthetic, machine-made, artificial
Manned	Crewed
Manpower	Personnel, workforce, worker
Six-man committee	Six-member committee
Workman	Worker

Alternatives to the use of gender-specific pronouns are a more difficult aspect of gender-neutral language. A number of different alternatives are possible but some work better than other circumstances. Evaluate alternatives keeping in mind the need for clarity and to avoid ambiguity. Some alternatives include:

1. Repeat the subject of the sentence. For example:
 - a. A person may be eligible to apply for a rebate if ~~he~~ THAT PERSON applies and includes all of the appropriate receipts
 - b. The applicant must sign ~~his~~ THE APPLICANT’S name.
2. Substitute a noun for the pronoun. For example:
 - a. Once ~~he~~ THE INDIVIDUAL submits the application, eligibility will be determined within 30 days.
 - b. Each contractor included in the utility-approved list shall be eligible to install HVAC equipment under the utility program. ~~He~~ A LISTED CONTRACTOR shall also be entitled to advertise as a utility-approved contractor.
3. Omit the pronoun or the phrase that would include the pronoun if the pronoun or phrase is not essential For Example.
 - a. A participant was given the opportunity to record ~~his~~ subjective experiences in a survey.
 - b. The commissioner issues an annual report with ~~his~~ recommendations.
4. Use an article such as “a,” “an,” “the,” or “that” instead of the pronoun. For example:
 - a. The contractor’s previous experience with high-efficient equipment will influence ~~his~~ THE recommendation to the homeowner.
 - b. The person shall submit ~~his~~ AN application.
5. Restructure or rewrite the sentence to avoid the need for a pronoun. For example:
 - a. ~~If an~~ AN applicant WHO has been licensed in another state ~~he~~ shall submit a verified application.
 - b. ~~If the researcher finds~~-UPON FINDING that the sampling frequency can be reduced without compromising the results, ~~he~~ THE RESEARCHER may reduce it with the approval of the department’s project manager.

Section 4: Description of Styles Used in Template

Normal Style (Calibri 11 pt., left justified, 10 pt. before, 0 pt. after, line spacing multiple 1.13)

**Title Style – i.e. Heading 1 –Only Use Once
(Calibri 24 pt., bold, RGB 0/56/101, right justified,
60 pt. before), border above RGB 0/56/101**

Report Subtitle Style (Calibri 19 pt., RGB 0/56/101, right justified,
0 pt. before, 0 pt. after)

Report Date Style (Calibri 14 pt., RGB 0/56/101, right justified,
10 pt. before, 120 pt. after), border below RGB 0/56/101

Author Info Style (Calibri 11 pt., right justified, 10 pt. before, 0 pt. after)

Author Details Style (Calibri 11 pt., left justified, 10 pt. before, 0 pt. after)

Author Details + Bold Style (Calibri 11 pt., bold, right justified, 10 pt. before, 0 pt. after)

**ACKNOWLEDGEMENTS TITLE STLYE (CALIBRI 11 PT., ALL CAPS, BOLD, RGB 0/77/141,
CENTERED, 10 PT. BEFORE, 0 PT. AFTER, IN BOX)**

Acknowledgements Text Style (Calibri 11 pt., 10 pt. before, 0 pt. after, in Box)

**Heading 2 Style (Calibri 18 pt., Bold, Box: RGB 0/77/141,
Text: white, 0 pt. before, 12 pt. after, line spacing single, page
break before)**

**Heading 3 Style (Calibri 18 pt., Bold, RGB 0/77/141, line below
RGB 0/77/101, 12 pt. before, 10 pt. after, line spacing single)**

Heading 4 Style (Calibri 16 pt., Bold, 12 pt. before, 10 pt. after, line spacing single)

Heading 5 Style (Calibri 14 pt., Bold and Italic, RGB 0/77/141, 12 pt. before, 0 pt. after, line spacing single)

Heading 6 Style (Calibri 13 pt., Bold, 10 pt. before, 0 pt. after, line spacing single)

Heading 7 Style (Calibri 13 pt., Italic, RGB 0/77/141, 10 pt. before, 0 pt. after, line spacing single)

Heading 8 Style (Calibri 12 pt., Bold, 10 pt. before, 0 pt. after, line spacing single)

Heading 9 (Calibri 11 pt., Bold, Italic RGB 57/57/52, 10 pt. before, 0 pt. after, line spacing single)

Caption Style for Figures & Tables (Calibri 10 pt., Bold, Centered RGB 57/57/52, 18 pt. before, 6 pt. after)

Footnote Text Style (Calibri 10 pt., 0 pt. before, 4 pt. after, single line spacing)

- a) Footnote Table Style (Calibri, 9 pt., 3 pt. before, 0 pt. after, single line spacing, numbered list a, b, c, etc.)

Footer Style (Calibri 9 pt., 0 pt. before, 0 pt. after, single line spacing, line above RGB 191/191/191, tab position right justified)