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## WHY DO STATISTICIANS NEED AN EDITORIAL STYLE GUIDE?

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## I.      INTRODUCTION

1.      Statistical agencies provide numbers, but they also produce lots of text in reports, articles, press releases, and web posts.  Some organizations have professional writers and editors who can assure uniformity and correctness.  In others, most of the content is written by statisticians and managers not trained to be editors and writers.  Some organizations have funnels that review the content before it is posted; others have a distributed model of web publishing.

2.      How can an organization maintain consistency in style and usage in an environment with many authors and many web posters?  An Editorial Style Guide is a way to formally establish agency rules and writing styles.  These rules support and guide a consistent, profession voice for the agency's content.  This paper explains how the U.S. Energy Information Administration (EIA) created its Style Guide, how style is different from strict rules, how we provided and communicated the content to staff, and how we continue to update and improve the Guide.  Two important aspects of our project were the staff workshops to introduce the Guide and the posting of the Style Guide as a wiki rather than a printed booklet for easy updating.

## II.      WHY CREATE THE STYLE GUIDE?

### A.      Many writers/few editors

3.      EIA has hundreds of staff people, including statisticians, mathematicians, engineers, and managers, who produce online content.  We have a distributed model for posting web content, with no funnel or final editor (although we do have a rigorous content review process that should catch obvious writing errors).  In the old days of paper reports, we had a standard production line from writer to editor to paper copy.  In the web days, much of our content goes from author to web.  The formal review process focuses more on statistics and analysis rather than punctuation and style.

4.      We felt that a mature organization with a distributed publishing model like ours needed a Style Guide.  Of course, a few ad hoc points of content always existed in our agency if authors had questions, but we lacked a central authority and formal document that laid out the agency's preferences and rules.  When an author was asked to correct a matter of style and didn't agree with the advice, they would ask "Where is it written?"  Staff members were expected to learn and use informally approved styles but didn't have a reference document.

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5. People who edited documents noticed the same errors over and over. The web team got asked the same questions. "How do I punctuate my bullet points?" "When do I use a hyphen?" "When do I spell out United States?" We needed a place to answer all these questions that was clear, accessible to staff, and relevant to our work.

6. It's much easier to notice inconsistencies in usage and style on the web. On paper, as long as you were consistent within a document, no one could compare your writing and editorial style with that in other agency reports (unless they had paper copies of those too). On the web, people can click around and see inconsistencies easily. Errors and style bloopers make the reader unsure of the quality assurance, not just of the text but of the numbers themselves. A user might rightly wonder, if the statistical agency doesn't proof its text content very carefully, then how closely do they look at their statistics? Ensuring that authors adhere to agency styles lends more credibility to the agency's product as a whole.

**B. Micro and Macro Challenges to Solve**

7. EIA faced several macro-level content challenges:

   a. How to help statistically-oriented staff write for a broad audience, everyone from policy-makers to school kids? EIA has a wide customer base, and we wanted to develop a style that would work for all customer segments.

   b. How to help the organization develop one voice online?

   c. How to endorse a plain language approach to online writing? The trick here is to balance plain language with accuracy. General statements that are easy to read may not be technically correct.

8. EIA also faced many micro-level content challenges:

   a. The U.S. imports oil every day
      The United States imports oil every day.

   b. The numbers are on the Web site
      The numbers are on the website.

   c. 4 electric power lines were down
      Four electric power lines were down.

   d. To subscribe, click here
      Subscribe to our list.

**III. DEVELOPING THE STYLE GUIDE**

9. EIA hired a contractor to help us develop the scope and content for our Style Guide. First we looked at the very outdated EIA Style Guide the agency produced in the days before online publishing. This relic had no advice about web topics, such as hyper links, and very few examples to illustrate the points. It was written in difficult-to-scan block paragraphs. Not all necessary topics were addressed. This guide had sufficed when only a few editors needed to use it, but it wasn't organized, complete, or clear for a larger audience.

10. Next we reviewed several standard style guides used in the United States, including the Government Printing Office (http://www.gpoaccess.gov/stylemanual/browse.html) and the Chicago Manual of Style (http://www.chicagomanualofstyle.org/home.html). We selected the sections and guidance that were needed for our organization. In many cases, because we are a government agency, we decided to follow the Government Printing Office style, although in cases where we disagreed with their advice (they say Web site, we say website), we adopted our own style.

11. In addition to the normal style guide advice on standard writing, we also added guidance specific to statistics (and especially to energy), a good example being the units of measure section. We added advice about spelling out acronyms and explaining technical terms. In many cases we created examples of the rules using energy references or using mistakes we had seen being made in the organization.

12.    This process of putting the meat on the bones of the chapters took many months and lots of work and review from both the in-house staff of two employees (working on part-time on this particular project) and the contractor. We estimate it took 18 months from conception of the Style Guide idea to hosting the staff workshops.

## Web Editorial Style Guide

Introduction

## Chapters:

1. Editorial Voice and Formatting
2. Commonly Misused Words
3. Hyphens and Dashes
4. Commas
5. Colons and Semicolons
6. Punctuating Quoted Text
7. Capitalization
8. Abbreviations
9. Numbers
10. Itemized Lists
11. Footnotes and Notes
12. Hypertext Links

## IV.    THE RIGHT-OR-WRONG VS. STYLE CONTINUUM

13.    One very important lesson we realized both as we developed the Guide and as we shared it with staff is that style is partly about things that are right or wrong, and partly about how your organization decides to do things.  No one should argue about when to use the words it's and its.  But many people have strong feelings about how to punctuate bullet points or how to write a paragraph (Can one sentence really be a paragraph?). Emotional ties to "how things should be done" seem to come in part from elementary English classes where the teacher taught the "right" way to do things, when in fact her lessons on some topics were about her preferred style (or, more likely, the way she was taught).  Some authors in EIA thought that what they had learned about certain style items (the serial comma being a good example here) was clearly right and wrong, and were surprised (and sometime a bit resistant) to find out there were other "right" ways of doing things.
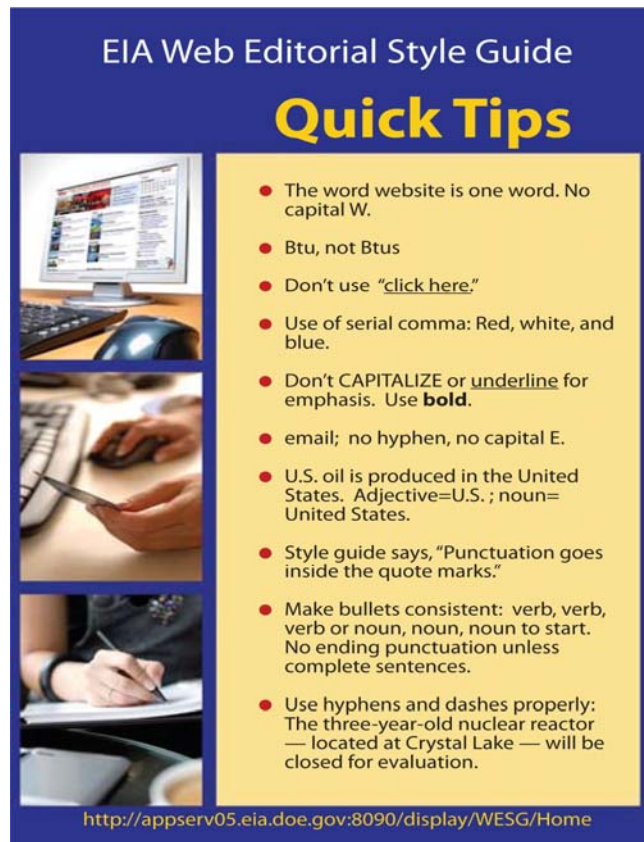
14.    The style you develop for your organization can be based on what other writers and organizations are doing, but it doesn't have to adopt all of anyone else's style. Your style is not the absolute correct way or necessarily applicable to other organizations.  News bureaus write differently from academics from statistical agencies from lawyers.  Style is an inexact science that runs on a continuum, and the farther you get away from the clear right-and-wrong things, the more conversion and persuasion you might need to use with your writers.

## V.    HOW IS OUR STYLE GUIDE DIFFERENT FROM OTHER ONLINE STYLE GUIDES?

15.     Our Guide has some additional aspects including:

a.   A section addressing content quality as well as correctness

b.   Customized advice for the publications EIA produces

c.   Many, many easy-to-find examples

d.   It's published as a wiki!

16. Yes, the Style Guide is published as a wiki. How does that work? We decided one problem with Style Guides as printed booklets is they represent a snapshot in time. It's not possible to make corrections, add new content, or expand the examples in a paper document. We wanted our Guide to be a living document, so we posted it online as a wiki. Currently, it's not a full-access wiki because we didn't want staff "correcting" the established style. Designated editors have access to the wiki and can make changes as something new comes up.

17. Having the guide as a wiki means we never have to worry about version control. Do I have the latest changes? Is this the most recent copy? At the beginning, we did provide one-time paper PDF copies so staff and managers could see what was available. We also printed a tip sheet and a post card with the top 10 style rules so staff could have an easy desk reference.



## VI.   STAFF WORKSHOPS TO INTRODUCE THE STYLE GUIDE

18. To introduce the Guide to EIA staff, we offered a series of 90-minute workshops, conducted by our contractor (supported by the internal communications staff). The sessions were open to all staff and announced in an agency-wide email. We actually were surprised at the interest — over 100 people attended one of the four workshops. A couple of people were a bit confused about what an Editorial Style Guide actually covered (and were disappointed we weren't covering graphing styles and standards) but many were openly happy the agency had decided to establish and formalize our writing style.

19. The workshops were:

   a. "10 minutes of silence and 80 minutes of participation." At the beginning, some people didn't know what we could possibly have to say about writing style that would take 90 minutes. Once we started discussing specific styles, many people had observations, suggestions, and sometimes contrary positions.

   b. About 25 people in each class, small enough to allow for group participation and discussion.

   c. Hands-on exercises — including a page asking them to find the mistakes

20. Comments from EIA content providers:

    a. "I've had the opportunity to review the Guide and have to say that my primary reaction is appreciation.  I have no doubt that the guide will be very helpful both to me and others throughout the organization."

    b. "Thank you for this wonderfully helpful guide!"

    c. "At last I have something to point to!"

## VII.  MANAGING THE WIKI

21. The flip side of publishing the Style Guide as a wiki is that someone needs to continue to maintain it. Our current procedure is:

    a. Two people in the communications group manage the wiki

    b. We keep a list of questions and suggestions from staff and from our own editing eye. We update the wiki either at the moment, if the correction is easy, or in batches as we discuss and decide where, what and how to add to new content.

    c. We continue to solicit and accept new Style Guide content.  Over the past six months, staff have suggested dozens of new ideas.

## VIII.   FUTURE PLANS FOR THE STYLE GUIDE

22. Several improvements to the Guide that we would like to make in the future include:

    a. Adding an index with links to the content.  Right now the main "navigation" is the Table of Contents, but the index (which has been created but not yet implemented) would point users to specific items, such as "numbers, when to spell out," or (another example from Marina's index).

    b. Continue to market the Style Guide in the employee newsletter

    c. Consider opening the wiki to staff editing.  Now that we have established a "culture of consistency," we might want to open it up.  Of course, the communications staff would keep a close watch on changes to the wiki.

    d. Offer more training.  One idea is to present Style Guide 101 (the basics that we covered in the first round of workshops) for new employees and Style Guide 201 for more serious writers.

## IX.    CONCLUSION

23. The Style Guide formally established EIA writing styles and rules in one place.  Even if staff can't remember the rules, they now know there is a place to look up the information.  If they don't find an answer or if the answer is confusing or not complete, they can contact the communications team who can easily make changes and additions to the Style Guide wiki.  A final unexpected outcome of the Style Guide is it confirmed the communications group as the point for making decisions about agency style.  People now regularly call and email with questions.  Instead of making up a rule or using incorrect style, at least now they know they should ask.

**HELPFUL LINKS**

EIA's Style Guide   http://tonto.eia.doe.gov/abouteia/pdfs/EIAWebEditorialStyleGuide.pdf  (The link goes to a PDF version of the Guide.  The wiki is for internal staff only.)

Grammar Girl  http://grammar.quickanddirtytips.com/

U.S. Environmental Protection Agency Guide
http://www.epa.gov/productreview/stylebook/index.html#intro

Federal Plain Language Guidelines  http://www.plainlanguage.gov/howto/guidelines/reader-friendly.cfm.