

Introduction

FPI has several publication formats, including reports, chart reports, presentations, briefs, press releases and testimony. Templates are available for these.

When using a publication template, it is best to go one document part at a time (for parts of documents, see the next page), and paste in your material before deleting the content already there.

Most publications contain Excel charts or tables. These can be incorporated into the publication in one of two ways.

- Copy the Excel figure and paste it into the Word document as Picture (Enhanced Metafile). Then pdf everything at once.
 - Note that this past option will generally fit the chart to the margins on the page.
 - Drag the corner of a pasted figure to re-size it.
- Print the Excel figure to pdf and use Adobe Acrobat to include it the publication pdf.
 - Use Excel to control the size and position of the chart on the page.
 - With this option, headers and footers, including page numbers, will be added in Adobe Acrobat after the entire document is assembled.

When distributing an advance copy, be sure to save the final version as is, then use Word or Acrobat to insert a watermark including the embargo time.

Document elements and specifications

Entire document

Margins – top and bottom .75 to 1.0 inches; left and right 1.0 to 1.25 inches
Exceptions: Book style reports with facing pages may have margins that are symmetric on the spread rather than on the page.

For parts of document, see CMOS (1.4).¹

Cover/title page – Use template. Include:

Title and date (at least month and year, usually also including day)
Logo (optional for designed reports)
URL (optional for designed reports)

Cover pages can be portrait or landscape. Briefs, press releases and testimony don't require a separate cover page. However, briefs and press releases should have the logo as part of the first page heading.

Back page

Logo
Mission statement
URL
Address and phone of two offices

Briefs, press releases and testimony don't require a separate cover page. However, the last page should include at least the first sentence of the mission statement, with the URL:

The Fiscal Policy Institute (www.fiscalpolicy.org) is an independent, nonpartisan, nonprofit research and education organization committed to improving public policies and private practices to better the economic and social conditions of all New Yorkers. Founded in 1991, FPI works to create a strong economy in which prosperity is broadly shared.

Front matter – paginated with lower case Roman numerals. May include:

Preface – acknowledgments, principal author info, related reports
Table of contents
Executive summary (may be included and paginated with body)

¹ *Chicago Manual of Style*, Fifteenth Edition, University of Chicago Press, 2006, www.chicagomanualofstyle.org.

Body – paginated with Arabic numerals starting with 1

Section headings

Headings can be TNR or Arial. (Be consistent within level.) For finished documents, defining and using the headings in Word (see Format, Style) allows automatic production of the table of contents.

Big papers: Heading 1 – 18 point; Heading 2 – 14 point; Heading 3 – 12 point bold.

Alternate for big paper: Heading 1 – 14 point; Heading 2 – 12 point bold; Heading 3 – 12 point bold italic.

Headings at a given level should be of parallel construction. Subheadings should have first word only capitalized. Consider putting subheadings into sentence form

Paragraph

Font for text – Times New Roman 12 pt, single spaced, zero spacing before and after paragraph

Left justification (optional exception for book-style reports: full justification)

Block paragraphs (no indentation)

Skip a line between paragraphs

One space (not two) after period before starting new sentence.

Headers – Report title or section name, usually TNR, 11 pt italic centered

Footers – FPI (Arial Black 11 pt) + 10 spaces then date (TNR 11 pt), tab to right margin for page numbers (TNR 11 pt)

Tables and charts

Number continuously as Figure X.

Figure titles can be TNR or Arial.

Titles are ideally in sentence form and capture the figure's "takeaway."

Sources – appear immediately below chart or table, in Arial 10 or 12; sentences and fragments end in periods.

Bulleted lists

- Level one solid round.
 - Level two solid square.
 - Level three hollow round.

Citations – Use the "notes and bibliography" system, with no bibliography. See CMOS (16.3).

Back matter – paginated Arabic, continue numbering from body

Appendices (optional)

Acknowledgments (optional)

Common format and usage calls

Capitalization

- Internet – yes
- web site – no
- governor, legislature, president, administration – no unless part of a title (8.21)
- state, city – only when referring to the government (8.56)
- upstate – no
- executive budget – no
- white, black – no (8.42)
- Hispanic, Latino – yes. Hispanic means Spanish-speaking. Latino means from Latin America.

Dates

- 1998-1999 rather than 1998/99 or 1998-99.

Phone numbers

- 518-785-3156 rather than (518) 786-3156 or 518/786-3156.

Punctuation and spacing (CMOS Chapter 6)

- Sentences – one space between sentences, not two
- Dashes – use m dash, immediately adjacent to flanking words (example—like this)
- Hyphens – Fractions and other phrases are not hyphenated unless the phrase is an adjective describing something else:
 - “one third of New York families” or “a third of ...” not “one-third of ...”
 - “Over 11 percent of white men are out of work” and “a substantial percentage of out-of-work men do not find jobs”
- Commas – do not use serial commas except when meaning is otherwise unclear
- Periods and commas precede closing quotation marks.
- List item punctuation – as a sentence. Lower case except at beginning of item; end last item with a period; end other items with a comma; possibly including “and” at end of penultimate item
- Quotes and apostrophes are “curly” rather than "straight." (However, straight may be preferable when writing for web or email.)

Spelling

- September 11 (rather than 9/11 or September 11th)
- E-mail – has a dash
- Lawsuit – one word
- New York – spell out except in tables and charts, or when used as an adjective. Abbreviate as NYS or NYC.

Fiscal Policy Institute Style Sheet

- Nonprofit – one word
- Percent – spell out except in tables
- United States – spell out except in tables and charts, or when used as an adjective. Abbreviate as U.S.
- Web site – two words

Citations – “notes and bibliography” system, without bibliography (CMOS 16.3). Italicize (do not use quote marks or bold) titles of sources. Source URLs should be live-linked.

All figures

1. **All figures** – both charts and tables – have three main elements:
 - a. The figure itself (including data and axis labels, column headings and legend as appropriate) in excel.
 - b. Figure number and title above the figure. Results are best when this matter is in document text (possibly in a text box). If the title is part of the excel figure, it will get scaled along with the figure; that is, you will have less control over font size. (This is less a concern if all the charts are the same size.)
 - c. Notes and sources below the figure. Although the comments in (b) are true here as well, these are typically included in the excel figure.

2. **Figure title** – Write the title to state the principal conclusion illustrated by the chart or table.
 - a. Put title in the document directly (possibly in a text box) rather than including it in the excel figure to allow for font size control.
 - b. Font: use Arial or TNR 14 to 22 point font (TNR 20 point bold for budget presentation). Be consistent.
 - c. Alignment is left justified or centered (left for budget presentation). Be consistent.
 - d. Capitalize first word only.
 - e. A period at the end is optional. (End with a period for budget presentation.)

3. **Notes and sources** –
 - a. Use text box (as for title) or include beneath figure; use 10 point font. If you're using a text box, it's good practice to keep note/source info in a text box in the excel document so that it can be copied at the same time the "picture" is copied.
 - b. Italicize (do not use quote marks or bold) titles of sources.
 - c. Spell out acronyms: CPS, BLS etc.
 - d. End each sentence or sentence fragment with a period. Avoid asterisks.

4. **Figure numbers** –

In most cases, figures are numbered—charts and tables together. “FIGURE X” usually appears above the figure title. Figure numbers are not necessary for powerpoint presentations (including the budget presentation) or chart packs with no text. For these, page numbers give adequate guidance.

Charts

1. **All graphs and plots** –
 - a. Font for axes, axis labels (if any), legends (if any) and data labels (if any) – Arial, at least 12 pt bold for increased readability. 14 pt bold is even better. Be consistent.
 - b. No tick marks on x or y axis.
 - c. No unnecessary decimal places in the labels on the Y-axis (i.e., if all the numbers after a decimal place are zeros, there is no need for the decimal places; if the y-axis labels are in half units, such as 6.0, 6.5, 7.0, 7.5, then all the labels should have one decimal place).
 - d. Use horizontal black dotted grid lines, weight 0.75. In Excel 2007, under Format Gridlines > Line Style, pick the fourth option under Dash type.
 - e. Axes and legend borders (if any) should be black.
 - f. If there is a box around plot area, it should be gray. (Black, for the budget presentation.)

2. **Line graphs** –
 - a. When using more than one line, be sure that the lines can be distinguished. (This is trickier for documents that will be printed.) Try using distinct markers.
 - b. Under Format Axis > Axis Options, pick “On tick marks” under Position Axis. Although the tick marks are not be visible, this option ensures that the data line goes from one side of the chart to the other (rather than being contained within the chart).

3. **Bar graphs** – Use color or (if document is to be printed) grayscale to distinguish series.

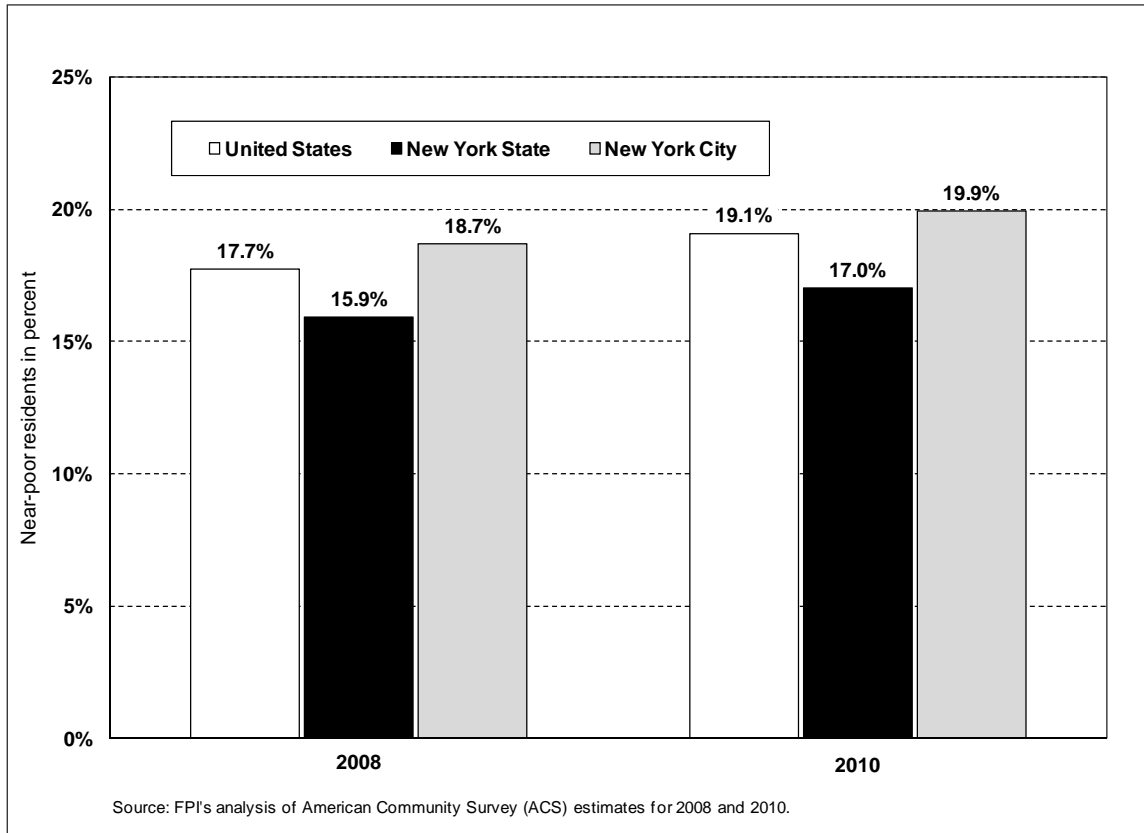
4. **About color** – FPI has established conventions for the four regions we measure often. The colors can be used for line graphs and bar graphs.
For documents distributed primarily by PDF:
 - U.S. Dark red, with square data marker for line graphs. (Scale of square should be one level lower than scale of other markers.)
 - NYS Dark blue, with circle data marker
 - NYC Purple triangles
 - Balance of state Green diamondsFor documents intended for print:
 - U.S. White (or black line with white square data marker outlined in black). Scale of square should be one level lower than scale of other markers.
 - NYS Black with circle data marker
 - NYC Medium-light gray triangles
 - Balance of state Medium-dark gray diamonds

Tables

1. Be sure to “hide” grid lines under View.
2. Font in the body of the table is usually Arial 10 or 12. The font should be the same size throughout the table. (Emphasize using indentation or bolding rather than font size.)
3. Generally, minimize the use of cell borders. Use narrow columns (.5 to 1.0 wide) to separate data columns. Turn on the bottom borders of cells containing column headings. Keep data columns of uniform width.
4. For tables with text data, and for dense numerical tables, you may want to preserve most cell borders. But try for a clean, uncluttered look.
5. Optional: shade selected rows.
6. Column headings are bolded, and have first word only capitalized. Avoid asterisks; usually, fine points about the data can be included in Notes below.
7. Justify column headings and data justification so that they harmonize—usually, left justify the leftmost column, and “center” the others. (Numerical data should be near the middle of the column but aligned by decimal point. Try this: in Format Cells > Alignment, pick “Right (Indent)” under Horizontal alignment, and then indent 1 or more spaces.)

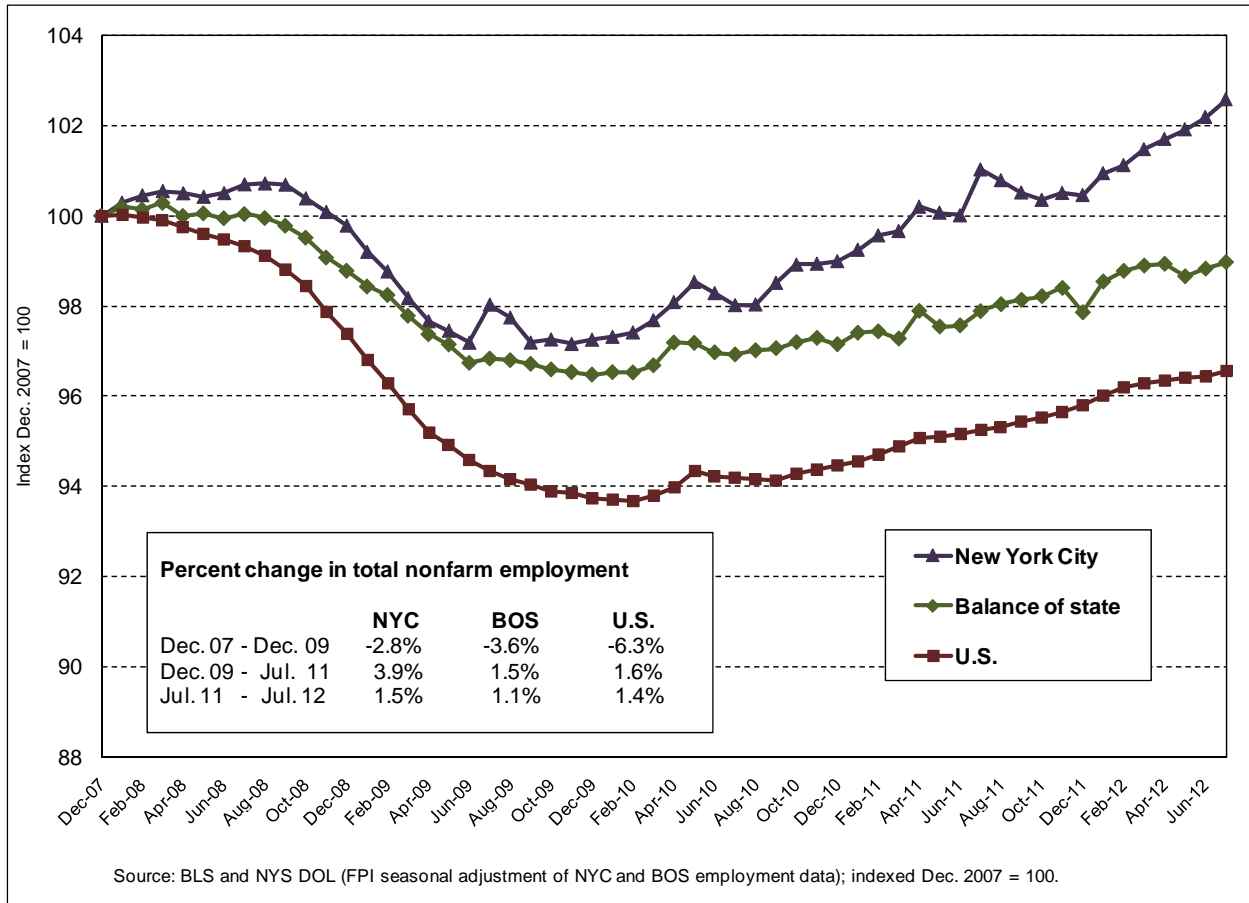
Poverty in New York and the U.S. rose sharply between 2008 and 2010.

FIGURE 17



New York City’s payroll job growth during the recovery’s first year-and-a-half was more than twice as fast as the nation’s overall, and about the same for the past year, while job growth in the balance of the state has slightly trailed the national average.

FIGURE 3



This one should have sources spelled out.

New York City’s unemployment rate may be slightly overstated, but the household survey shows unemployment is much higher for blacks and Hispanics, and workers with some college and those ages 35-44 have been hard hit by the recession and weak recovery.

FIGURE 12

New York City	Employment to Population Rate			Unemployment rate		
	1H 2008	1H 2012	Change in pct. point	1H 2008	1H 2012	Change in pct. point
ALL	56.4%	54.1%	-2.4%	5.3%	9.7%	4.4%
Gender						
Males	63.9%	60.6%	-3.2%	5.2%	9.6%	4.5%
Females	49.9%	48.3%	-1.6%	5.4%	9.7%	4.3%
Race and Ethnicity						
White non-Hispanics	57.4%	57.2%	-0.1%	3.1%	6.9%	3.8%
Black non-Hispanics	56.2%	49.1%	-7.1%	7.1%	14.4%	7.3%
Hispanics	54.4%	51.4%	-2.9%	6.9%	12.8%	5.9%
Asians & others	58.5%	58.6%	0.1%	4.8%	4.0%	-0.8%
Education Attainment Level						
Less than High School	36.7%	34.5%	-2.2%	6.5%	10.1%	3.6%
High school or equiv.	54.0%	53.2%	-0.8%	5.7%	10.9%	5.2%
Some college	67.1%	60.6%	-6.5%	4.4%	10.7%	6.3%
College and higher	77.3%	75.7%	-1.6%	2.6%	6.2%	3.6%
Selected Age Groups						
18-24	42.2%	35.3%	-6.9%	13.0%	17.0%	4.0%
25-34	77.2%	69.4%	-7.7%	4.4%	9.9%	5.5%
35-44	76.0%	70.8%	-5.2%	3.9%	10.3%	6.4%
45-54	73.0%	72.7%	-0.3%	4.0%	7.3%	3.3%
55 and older	31.8%	36.3%	4.5%	4.7%	7.0%	2.3%

Note: Education breakouts for those 25 and older only.
Source: FPI analysis of CPS and NYS DOL LAUS Labor Force Statistics for NYC

To put a border around a table, flank the table with narrow columns (column width .5 or 1) and rows (row height 5). Border these flanking columns and rows to preserve a little white space between the outline and the table contents.

**Number of people living in poverty (in thousands)
and the poverty rate: 1980 to 2011**

Year	New York State			United States		
	Total*	Number of Poor	Poverty Rate	Total*	Number of Poor	Poverty Rate
1980	17,321	2,391	13.8%	225,027	29,272	13.0%
1981	17,471	2,516	14.4%	227,157	31,822	14.0%
1982	17,656	2,607	14.8%	229,412	34,398	15.0%
1983	17,576	2,817	16.0%	231,700	35,303	15.2%
1984	17,560	2,806	16.0%	233,816	33,700	14.4%
1985	17,668	2,796	15.8%	236,594	33,064	14.0%
1986	17,585	2,322	13.2%	238,554	32,370	13.6%
1987	17,470	2,506	14.3%	240,982	32,221	13.4%
1988	17,635	2,369	13.4%	243,530	31,745	13.0%
1989	17,938	2,254	12.6%	245,992	31,528	12.8%
1990	18,038	2,571	14.3%	248,644	33,585	13.5%
1991	17,914	2,736	15.3%	251,192	35,708	14.2%
1992	17,975	2,820	15.7%	256,549	38,014	14.8%
1993	18,213	3,097	17.0%	259,278	39,265	15.1%
1994	18,218	2,981	16.4%	261,616	38,059	14.5%
1995	18,345	3,058	16.7%	263,733	36,425	13.8%
1996	18,258	3,020	16.5%	266,218	36,529	13.7%
1997	18,103	2,979	16.5%	268,480	35,574	13.3%
1998	18,370	3,068	16.7%	271,059	34,476	12.7%
1999	18,855	2,676	14.2%	276,208	32,791	11.9%
2000	18,752	2,604	13.9%	278,944	31,581	11.3%
2001	18,783	2,664	14.2%	281,475	32,907	11.7%
2002	19,224	2,690	14.0%	285,317	34,570	12.1%
2003	18,922	2,707	14.3%	287,699	35,861	12.5%
2004	19,010	2,847	15.0%	290,617	37,040	12.7%
2005	18,995	2,760	14.5%	293,135	36,950	12.6%
2006	19,021	2,668	14.0%	296,450	36,460	12.3%
2007	19,021	2,757	14.5%	298,699	37,276	12.5%
2008	19,309	2,734	14.2%	301,041	39,829	13.2%
2009	19,158	3,018	15.8%	303,820	43,569	14.3%
2010	19,116	3,062	16.0%	306,130	46,343	15.1%
2011	19,329	3,085	16.0%	308,456	46,247	15.0%

NOTES: Numbers in thousands. Total population is the total population for which poverty status is determined.
SOURCE: U.S. Bureau of the Census, Current Population Survey, Annual Social and Economic Supplements, Historical Poverty tables.

This one uses color to emphasize a point: poverty in the U.S. was the highest it's been since 1993

New York City has the third highest density of foreign born residents

	Total Population	Foreign-born population	Immigrant density
Los Angeles, CA	3,731,437	1,505,337	40.3%
San Jose, CA	887,330	336,021	37.9%
New York City, NY	7,956,113	2,915,722	36.6%
San Francisco, CA	719,077	257,569	35.8%
Houston, TX	1,941,430	564,175	29.1%
Dallas, TX	1,144,946	313,121	27.3%
San Diego, CA	1,208,331	319,142	26.4%
Phoenix, AZ	1,377,980	311,167	22.6%
Chicago, IL	2,701,926	590,416	21.9%
Austin, TX	678,457	123,382	18.2%
Fort Worth, TX	604,538	105,940	17.5%
San Antonio, TX	1,202,223	168,825	14.0%
Charlotte, NC	601,598	79,600	13.2%
Philadelphia, PA	1,406,415	155,961	11.1%
Columbus, OH	693,983	63,134	9.1%
Jacksonville, FL	768,537	60,030	7.8%
Indianapolis, IN	765,310	51,295	6.7%
Detroit, MI	836,056	52,390	6.3%
Memphis, TN	642,251	36,455	5.7%
Baltimore, MD	608,481	34,225	5.6%

Figure 4.

Source: American Community Survey 2005 (American Fact Finder).

Note: Populations are of city, not metropolitan region.

This one would look a little better if the numbers were nearer to the column center, while remaining right-justified. (The column headings could be centered.) See #7 under Tables for tips.