Focus on Energy Documents and Deliverables Guide

The following best practices should be used for all Focus on Energy documents and deliverables intended for external or final use, including reports and presentations. When creating documents, the author should think about the intended audience and what the audience expects to obtain from reading the material. Focus on Energy follows the Associated Press Style Book for writing practices, unless otherwise noted.

I. Format

- Focus on Energy templates should be used for all documents and deliverables. Current versions of templates are available on the Focus on Energy SharePoint in the “Marketing and Communications” tab.

- Preferred font for word documents is Times New Roman, size 11, unless a specific template already exists (e.g. Monthly Report Template – Cambria, size 11).

- Word documents should be single spaced with zero spacing before and after the line.

- Final versions of deliverables should be submitted in PDF format, unless requested otherwise.

- All documents should have page numbers if the document exceeds one page.

- Utilize the headings function to structure content into sections and subsections.

- When using the Focus on Energy logo and other brand identifiers, refer to the Focus on Energy Brand Standards and Style Guide.

- All tables and figures should have captions. If these are mentioned in the text, the appropriate table or figure should be referenced using the “cross-reference” function in MS Word.

II. Grammar and Conventions

- Use third person.

- All acronyms should be spelled out the first time they are presented in a document, followed by the acronym in parentheses (e.g. Multifamily Energy Savings Program (MESP)).

- Avoid contractions (e.g. it’s, they’re, didn’t, can’t), and colloquialisms, idioms, slang, and qualitative words (e.g. few, little, much, several, some).

- Use a comma in numbers to identify thousand or million figures in both text and tables (1,683,000 kWh).

- When referring to dollar amounts in tables, use both decimal places for zeroes ($126.00). In text, do not use decimal places for zeroes ($126).
Format dates as follows: Month Day, Year (e.g. May 22, 2011).

Avoid referring to Focus on Energy as “Focus”, “FOE” or “Focus on Energy Program.” The correct terminology is “Focus on Energy.”

Capitalize proper names (e.g. New Homes Program, Business Incentive Program, Program Administrator, Program Implementer, Trade Ally, etc.) but not other names (e.g. residential program, hybrid measure, etc.).

Spell out numerals 1-9 (e.g. one, three, nine, 10, 100).

Capitalize table headings, unless the word is a preposition.

Avoid using “staff”, or pronouns (e.g. “we”) to describe an entity of Focus on Energy.

Avoid using company names for Focus on Energy contractors. Instead, use the terminology “Program Implementer” or “Program Administrator.”

Avoid referring to Focus on Energy incentives as “grants”, unless the incentive is clearly a grant (e.g. staffing grants). The correct terminology is “incentive.”

Use one space in between sentences.

Use active voice, rather than passive voice (e.g. “the Trade Ally installed the equipment” rather than “the equipment was installed by the Trade Ally”).

Avoid beginning or ending sentences with a number (e.g. “The program processed 49 projects” rather than “49 projects were processed”).

Capitalize: Therms, Trade Ally, SPECTRUM, ENERGY STAR.

III. Content

Include a list of acronyms and Table of Contents when appropriate, at the beginning of a document.

Use specific concepts and not speculative ideas when writing narratives; keep text simple and concise. (e.g. “This paragraph demonstrates good style in report writing” rather than “In this paragraph is a demonstration of the use of good style in the writing of a report”).

Arrange information in order of importance to the audience.

Paragraphs should be split by idea, and should be three to four sentences long. Begin paragraphs with key sentences. Keep similar information together, and remove obvious or unnecessary information.

Never mention the name of a specific customer. If it is a business, describe the type of business (e.g. a grocery chain, an appliance retailer, an elementary school, etc.).

When reporting energy savings, always report in the order of kW, kWh, Therms.
• When reporting a zero in a table, using a dash “-” rather than a “0”.

• Ensure all documents and deliverables intended for external use are reviewed for content and formatting by someone in addition to the creator.

• All documents should be spell-checked for appropriate spelling and grammar usage.

• Ensure both font size and font type are consistent throughout the document.

• Prior to finalizing a comprehensive document, verify that tables, images, figures and headings are appropriately labeled and referenced in the text.

IV. MS Word Documents:

• Verify that all text is appropriately aligned, whether left or justified. Verify that indentations for bullet points are consistent.

• Ensure that the hierarchy used for bullet points and numbered lists is consistent throughout a document.

• For creating revised versions of documents, it is appropriate to use the track changes feature in MS Word.

V. MS PowerPoint Presentations:

• Use an agenda slide at the beginning to summarize the presentation.

• Limit text as much as possible; ideally, use the “seven by seven rule”, with no more than seven bullet points per slide, and no more than seven words per bullet point.

• Utilize tables, graphs, and images to provide visual information in addition to text.

• Structure the presentation appropriately and use bullet points consistently.

VI. MS Excel Spreadsheets:

• Ensure all formulas are reviewed for correctness.

• Format columns consistently.

• Numerals should be formatted consistently in all tables.

• Sort data alphabetically when appropriate.

• Bold headings, and place data directly beneath headings.