Department
for Education

Style and formatting guide for research publications

October 2015

Contents

Introduction

The Department for Education (DFE) commissions research to inform policy development on a range of areas. Research is published in the department's research report series on GOV.UK.

The aim of this guide is to help authors produce research reports that will be read and understood by policy customers, ministers and others outside the DfE. It also has guidance on writing in plain English, using the departments research report template and making reports accessible so we comply with the Equalities Act 2010.

We hope the guide will save time for authors' and the department, by minimising the number of comments which need to be incorporated after the first draft of a report. We also hope that it will help authors to produce reports that maximise the impact of findings.

Research report structure and content

Research reports, briefs and technical report

There are usually three formats for research reports:

- **A research brief** – A self-contained summary of the research, usually around 2,000-2,500 words. Readers may not be familiar with research jargon, but they are likely to be educated readers looking for an answer to a question.

- **A research report** –The main output from the research.

- **A technical report** – A more detailed 'academic' report which places greater emphasis on the methodology. This isn't always necessary.

You should discuss with your project manager which format is most appropriate for your project.

Broad structure and content of reports

All research reports must be developed using the [DfE template](#).

Apart from the need for a concise summary of the research, there are no hard and fast rules. A research report is likely to contain the following:

- Title page
- Contents
- Acknowledgements
- Executive summary
- Main report
- Appendices
- References and sources
- Disclaimer and copyright

Title page

The title should be short, interesting, and give a general idea of content in a non-technical way.

When your report is published on GOV.UK the title of the web page must be fewer than 65 characters (including spaces) so ideally you may wish the title on the report to match. This will help our readers search for the research report they require.

Use a 'Front-load' titles. Put the words people are most likely to search for at the front and use colons as connectors. For example, 'Income Tax reform: impact assessment' is clearer than 'An assessment of the impact of proposed reforms to Income Tax'

Examples of good titles include:

- Pupil premium: an evaluation
- Family Fund Trust review

The front cover should include one of the following logo (DfE/NCTL/EFA/STA) depending on who commissioned the research. It may also include the logo of other government departments or agencies involved in the project, especially if it is jointly commissioned. It should not include any company or organisational logos.

The front cover should also include the month and year of publication, and a list of authors and their institutions, as seen in the DfE template.

Contents

All reports should have a contents page and a list of tables and figures if appropriate. The content page structure is laid out in the DfE template.

Acknowledgements

You may want to add acknowledgements to the report thanking those who contributed to the research. However this is not mandatory.

Executive summary

This is the section which ministers and senior policy customers are most likely to read so clarity and conciseness are essential.

As well as being incorporated in the body of the report, the summary should stand up to being read independently and should be between two and eight pages in length. This can form the basis of the research brief if one is being produced separately.

When producing the first draft of a report for the department, the summary should ideally be included at the same time, rather than at a later date. The summary should include:

- the aims of the project and a brief description of the research methodology;
- all important findings and conclusions. These must signpost readers to the relevant section in the main text of the report. For example: 'Clients thought staff were knowlegable (Section 3.2)'; and
- policy recommendations, where appropriate.

Main report

The main report should include the following sections:

- the aims of the project.

- a background to the project.

- a layperson's guide to the research methodology, including an indication of how the methodology affects the kinds of inferences and conclusions that can be drawn from the findings.

- findings - consider using summary boxes to highlight key points at the start of each section reporting findings. It is often best to structure findings around the themes which emerge rather than around the methodological chronology

- conclusions and recommendations. This is where we answer the question: "so what?" It may need to refer to policy developments in the area. Any recommendations should clearly stem from the interpretation of the evidence, where possible being linked back to specific key findings.

Detailed technical and methodological information should be included in appendices rather than in the main body of the report

Appendices

The following types of information should be placed in appendices:

- detailed technical information eg. sample frame

- sampling method

- response rates

- any other methodological information

- questionnaires, topic guides and other important field documents

References and sources

References should be listed alphabetically by author in a single bibliography at the end of the main report in the Harvard style, rather than at the end of each section.

Disclaimer and copyright

The back page of your report will include copyright details, contacts for further information, the DfE reference and an ISBN number. The DfE report number and ISBN

number will be provided by DfE (from the research programme team and digital communications team respectively).

Copyright usually rests with the author unless the report is written by the DfE project manager.

A disclaimer should be included. This is provided in the [template for DfE research reports and briefs](#) . There are two versions

- Post May 2015

  The views expressed in this report are the authors' and do not necessarily reflect those of the Department for Education

- Pre May 2015

  This research was commissioned under the under the 2010 to 2015 Conservative and Liberal Democrat coalition government. As a result the content may not reflect current Government policy. The views expressed in this report are the authors' and do not necessarily reflect those of the Department for Education.

Project managers should contact the research programme team for advice on the disclaimer where the department owns the copyright for the report.

Style guide

Write clearly, using plain English

- **Use plain English.** Don't use formal or long words when easy or short ones will do. Use everyday words that are used in conversation. Remember you are trying to engage, rather than impress, readers.

- **Avoid using jargon**. If you need to introduce a technical term, make sure you explain it first, in plain English. The first time you use an abbreviation or acronym, explain it in full.

- **Be concise.** Leave out any unnecessary information. Keep sentences and paragraphs short. An average of 15 to 20 words per sentence is ideal.

- **Make your sentences active rather than passive**. Active sentences give your writing energy and clarity. They're quicker and easier to read and are more memorable.

- **Be specific**. Don't use words that are too general and vague as this can lead to misinterpretation or empty, meaningless text.

- **Use sub-headings**. These are a good way of breaking up text into easy-to-manage chunks and they help you organise the points you want to make in a logical way.

- **Write in a balanced, value-free way** based on evidence from the research and not conjecture

- **Clearly distinguish** inferences, conclusions and recommendations from descriptions of the findings

    Cite all sources

You should also refer to the [Government Digital Service style guide](#) which covers style, spelling and grammar conventions for all content published on GOV.UK, arranged alphabetically.

Numbers and percentages

Make it clear exactly what the percentages are describing. This is especially important when discussing findings for subgroups, or subgroups of subgroups, rather than the sample as a whole.

In text, try to avoid starting sentences with numerals. If it is necessary, the number should be written in full. For example, 'Eighty-seven disabled people were interviewed.'

At all other times, use numerals. Large numbers can be rounded for economy, but clearly some judgement is needed.

Fractions should be written out in the text and hyphenated, for example, one-third, and two-fifths. In tables and diagrams they should be presented in numerical form.

Where fractions or proportions are given in the text, the percentage should be given in percentages afterwards. For example, 'Three-quarters of parents (75%) were dissatisfied'.

Figures of 0.5 or above, in both text and tables, should be rounded to the nearest whole number (except in special cases: for example, where showing slowly changing indices).

It is important to remember that not all readers will understand percentages correctly. Percentages over 100% are often misinterpreted: for example, some people think a 200% rise in a value means that it has doubled, rather than tripled. In these cases, use words rather than figures to make the point.

Tables

Tables are tools to get a message across clearly and simply. If possible, large tables with many columns and rows should be avoided. In some cases, two smaller tables would show the data more clearly than one large one.

Tables should not be used in isolation, but the information summarised and key findings or points indicated in the text.

Always give the unweighted bases in the table where the difference between weighted and unweighted numbers is small; but where the weights are large, and the two sets of numbers are very different, both bases should be included.

Describe the base underneath the table, for example, 'Base: all respondents (1,520)'.

Use concise and informative titles, which indicate the main axes of the table. Section heads within tables should be bold and base or total should be italicised.

If applicable, the source should be quoted beneath the table and tables should be consistent throughout the report.

Figures charts and diagrams

Like tables, figures charts and diagrams should be as clear as possible. Please use concise and informative titles. Avoid using 3-D charts as they are more difficult to read.

They are generally produced in black and shades of grey, or white unless too complex. Colours should only be used in exceptional circumstances, for example where it is necessary to differentiate between a number of lines or bars in a chart.

Where applicable, the source should be quoted.

The style of figures and diagrams should be consistent throughout the report. For further information see guidance produced by the Government Statistical Service.

Alternative text for graphics – If you use a graphic to provide information you should provide the same information in a format that is accessible to blind and visually impaired people.

Formatting your report and making it accessable

You must use the department's [template](#). This gives all our documents a consistent look, and follows our corporate style. This template has our branding saved in it: logos, margins widths, and body text, heading and bullet point styles. The template also helps you produce a document that meets the accessibility requirements of the [The Equality Act 2010](#).

Using the template

Our corporate text styles are saved in the template. Use the quick styles bar on Word 2010's Home tab to apply them. The bar is in the top right-hand corner of your screen:
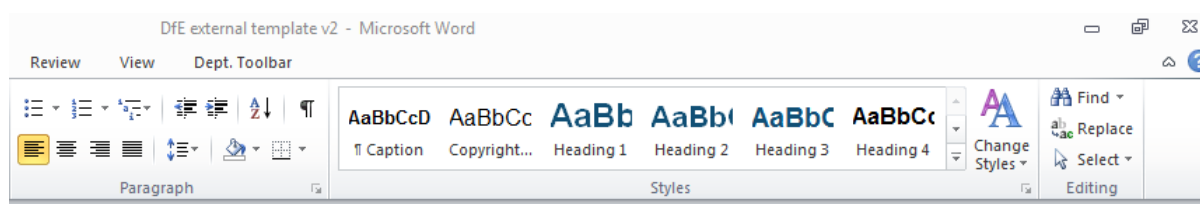
To apply saved styles: highlight the text you are applying the style to, and then click on the relevant style in the style bar. Scroll down the styles bar for more styles (eg. for captions, numbered paragraphs and bullet points). Body text is saved as 'Normal'.

The styles saved within the template need to be applied to all sections of your text.

Accessibility requirements

Government organisations are bound by the requirements of [The Equality Act 2010](#). The Act makes it illegal for a website or information provider to discriminate against a disabled person. We have to ensure that all the documents we publish on the web are accessible to people with visual, hearing, motor-skills or cognitive impairments.

In particular, screen-reading software will not understand some graphics and flowcharts and will read out repeated blank spaces to the user. You need to aim for all of your text to be searchable and selectable.

To make your document accessible you will need to:

- Use the saved heading styles and crerate a table of contents
- Use short headings
- Label tables and figures
- Make your charts and graphs into images

- Add alternative text to photos, tables, flowcharts and disagrams

- Use hyperlink text that is meaningful and test all your links

- Structure tables so they can be navigated easily

- Avoid using repeated blank/design characters

- Avoid using foating objects

- Test the document using Word's Accesibility Checker

- Ensure the document can be zoomed in

- Use a good colour contrast

Making your document accessible

Use the saved heading styles and create a table of contents

Documents that are more than a couple of pages long are required to have a table of contents.

Contents

Our corporate text styles are saved in the template.. The table of contents is generated automatically from the heading styles.

There are 4 heading levels saved in the template. Heading level 1 will always start on a new page. Heading levels 1, 2 and 3 will appear in the table of contents.

To update the table of contents to reflect changes in headings and page numbering, right-click on the table of contents and click 'Update field'.

If you don't apply heading styles to your text, you won't be able to generate an accessible table of contents.

How to apply heading styles:

1. Select the text you want to make into a heading.
2. On the Home tab, in the Styles group, select the appropriate level heading style from the Quick Styles gallery, e.g. Heading 1, Heading 2, Heading 3

Use short headings

Document headings should be short, so that readers can quickly navigate the document. Try to keep your headings to a maximum of one line or 20 words long. If you use long heading titles, they will be cut short in the navigation pane down the side of the document in Word or Adobe Acrobat and can lose their precise meaning.

Label tables and figures

As well as a table of contents your report will also need a list of figures and tables. This can be created and updated automatically, but the titles need to be labelled in a specific format.

To update the list of figures and tables to reflect changes and page numbering, right-click on the list of figures or tables and click 'Update field'.
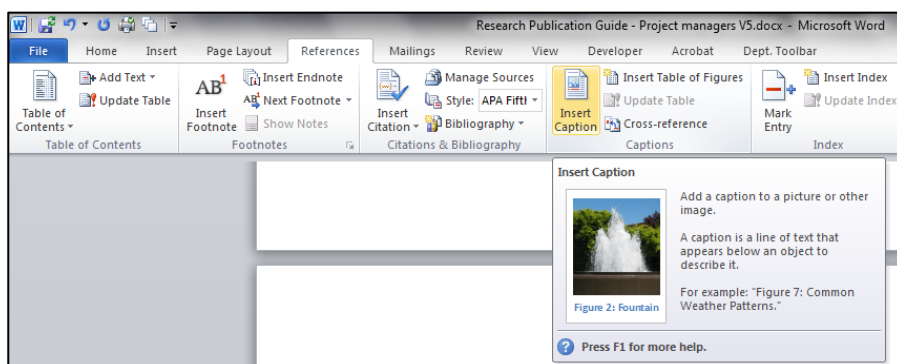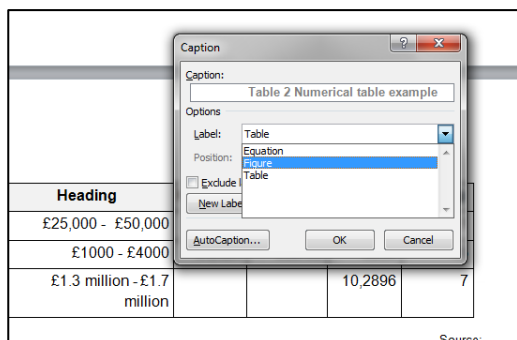
List of tables

How to label tables and figures:

1. Click above where your table or graph is in your document.

2. Click on the 'references tab' and go to insert caption.

3. Select the appropriate label and write in the title of the table/figure into the caption box.

4. Click ok.

Make your charts, graphs and flowcharts into images

To make the document more accessible in its final PDF version (which is what will appear online) you need to insert all charts or diagrams that are made up of separate elements into your document as an image, ie – JPEG, GIF as appropriate.

If your image is made of a lot of little images, for example a flowchart, cut and paste all the composite parts into a single image. Remember to keep a copy saved as an editable version in case you need to update the artwork in future.

How to make your charts and graphs into images:

1. Highlight the graph or chart.
2. Click cut and then paste it back in as a picture.

Add alternative text to photos, tables, flowcharts and diagrams

Alternative text (also known as 'alt text') appears when you hover your mouse over a picture or object. It looks like a text label providing more information about that item. Alt text helps people who use screen readers and can't see images properly to understand the content and context of images in your document.

Alt text should be included for any of the following information types in your document: photos, charts, diagrams, flowcharts, shapes (that don't contain text and are not in groups) and graphics.

When creating alt text you must add a title, and a description. The title can be very brief, for example "Figure 9 bar chart". The description adds more detail. This can be up to 4 sentences long and describes what the image shows rather than simply repeating the

title. For example: 'This bar chart shows an upward trend in expenditure over a six year period from 2007 to 2013;' 'The figure shows that pupils in Sweden perform better than pupils in the UK at ages 10 and 14 years.' If the image is too complicated to describe concisely, and its contents are already covered adequately in the text, you can set your alt-text to say 'a full description of this item follows within the main text'; only do this if really necessary.

Penn State University has some helpful tips on creating meaningful alt-text for complicated visual elements:

How to add alt text in Word 2010

1. Right click on the image or object.
2. Choose Format.
3. Choose Alt Text.
4. Enter a description of the image or object into the **Title and Description** text boxes. Use clear, concise descriptions. For example, 'a flowchart showing the Serious Case Review process' gives the reader more contextual information that just 'a flowchart'.
5. Click Close.

Examples of Alt-text
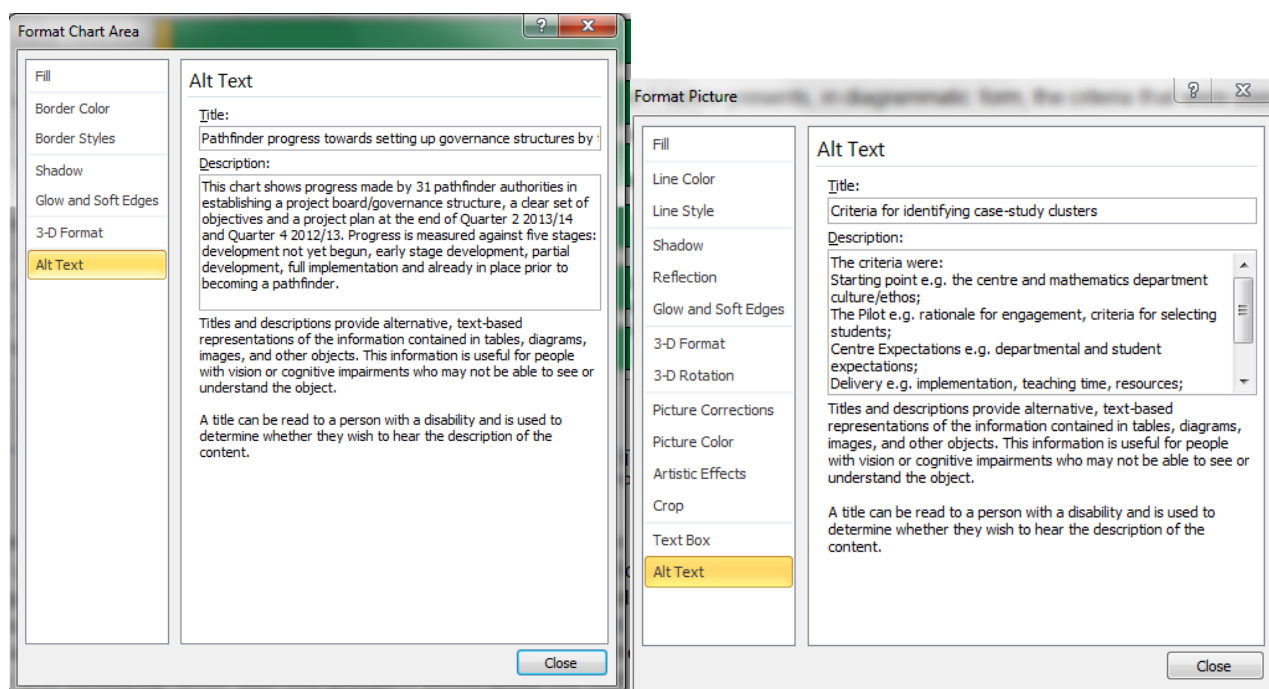
Use hyperlink text that is meaningful and test all your links

Hyperlink text in your documents should provide a clear description of what the visitor will find at the link destination, rather than only providing the URL, or ambiguous words like "here" or "this." You should always aim to write short concise link text so the person can predict where they will end up, before they click on it.

For example [Munro review of child protection: final report](www.gov.uk/government/publications/munro-review-of-child-protection-final-report-a-child-centred-system) rather than: www.gov.uk/government/publications/munro-review-of-child-protection-final-report-a-child-centred-system.

Always test all the hyperlinks in your document to check they work.

Structure tables so they can be navigated easily

If you use a table, check the reading order to be sure that it makes sense and you can tab through left to right and top to bottom.

Avoid using tables within tables ('nesting') and merged or split cells inside of tables. This makes the data harder to navigate through using a screen reader or the keyboard shortcuts. Complex tables are difficult to navigate and end up being read out in a meaningless, confusing and unpredictable order.

How to check the reading order

1. Tab through the cells sequentially
2. Check that cursor moves through your table in a logical order

Having clear column headings at the top of the table helps to provide context and assists users to navigate the table's contents.

How to specify a header row in a table:

1. Click anywhere in the table.
2. On the Table Tools Design tab, in the Table Style Options group, select the Header Row check box.
3. Add your header information.

Avoid using repeated blank characters

People who use screen readers to read documents electronically may perceive extra spaces, tabs and empty paragraphs as blanks. After hearing "blank" several times, those users may mistakenly think that they have reached the end of the information. Equally, don't use long sequences of full stops, dashes or underscores to space out content, the

screen reader will still read out the text literally, ie. "full stop, full stop, full stop", which quickly becomes frustrating for the user.

Instead, use formatting, indenting, and styles to create whitespace and be careful of repeating characters in your content. You can also use a page break.

How to use formatting to add whitespace around a paragraph:

1. Remove any existing whitespace around the paragraph.
2. Select the text, then right-click and choose Paragraph.
3. Select values for Indentation and Spacing to create whitespace or drag the grey guides on your ruler in Word.

Avoid using floating objects

Floating objects are things like coloured text boxes that are not in line with main text. They are usually challenging to navigate, and depending on the colour-scheme, they may be inaccessible to users with vision impairment.

Setting text-wrapping around objects to Top and Bottom or In Line With Text makes it easier for people with screen readers to follow the structure of your document.

How to change the text-wrapping around objects:

1. Select the object, and right-click.
2. Choose Wrap Text, and then select either In Line With Text or Top and Bottom from the list.

Ensure the document can be zoomed in

If your document has small, fine details, or a very small font in places, make sure your users can zoom in sufficiently so they can see all the small details clearly.

Use a good colour contrast

When using text boxes ensure that there is a good contrast between the foreground and background. You will need to make your own judgement about this – it won't be picked up by an accessibility check.

Don't use colour or shape as the only way to identify something in your document. Use text labels or descriptions instead.

If you choose to use a text box with a background colour, the background should be from the DfE approved colour palette and the text should provide a clear contrast. (See the Approved colour palette found in the [template for DfE research reports and briefs](link))

Test the document using Word 2010's accessibility checker

Word 2010 includes an accessibility checker that allows you to check for problems.

To run the accessibility checker in Word 2010: Select File > Info > Check for Issues > Check Accessibility.
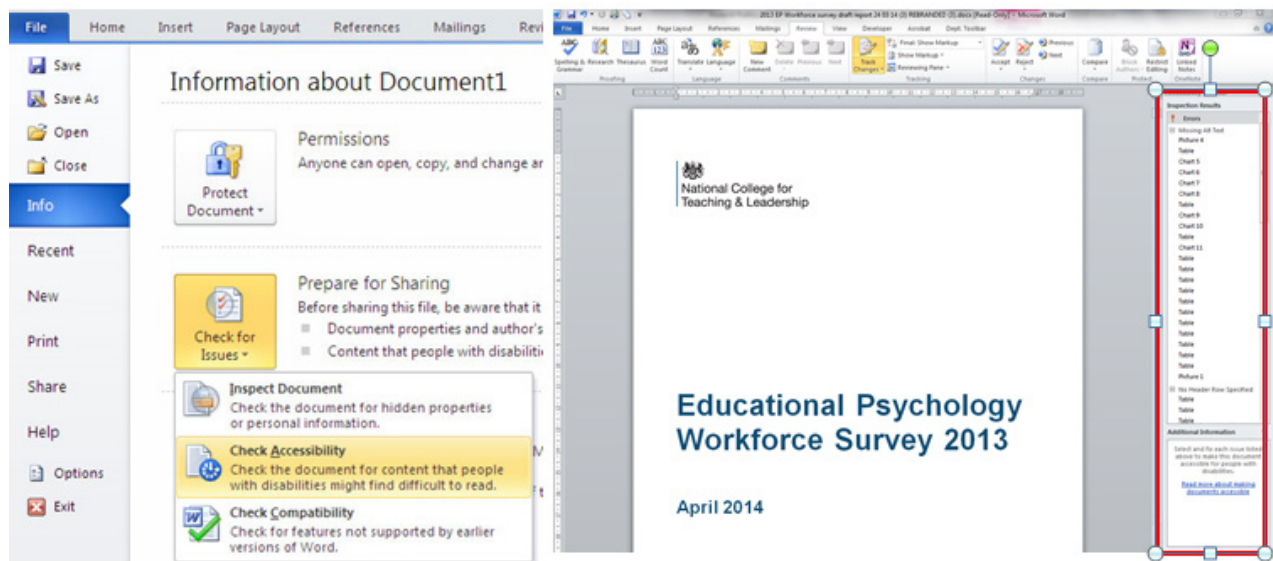
Word generates a list of issues to rectify. **The document should not be submitted for publication until all the accessibility errors have been corrected.** If the list is very long and repetitive this is likely to be because the document does not make effective use of Word formatting features; for example, multiple carriage returns have been used instead of a page break, or spaces have been used instead of indents.

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facebook.com/educationgovuk