

EXHIBIT 2.A: CONSULTANT WRITING GUIDELINES

Revised 5/26/2015

Use the following guidelines to complete the various deliverables required for the OSPR Program:

Page layout:

- Left-justified.
- Right-hand margin ragged.
- Single-spaced paragraphs.
- Margins: 1 inch all the way around.
- 12 pt. Times New Roman Normal font style; do not use special or custom styles (e.g. Heading, Body Text, Title, etc.).
- Single space after each sentence and/or colon.
- 12 pt. space between sections, subsections, paragraphs, and exhibits.
- Use page breaks to avoid splitting sections, subsections, paragraphs, and exhibits.
- 12 pt. Times New Roman Italic font for headers and footers.
- Headers should have name of school district being reviewed on the inside of the page and chapter title on the outside of the page.
- Footer should have company name of Offeror performing the review on the inside of the page and page number on the outside of the page.

Writing Style:

- Use active voice when possible.
- Avoid jargon, technical terms, and unclear or arcane language.
- Avoid negative tone.
- Avoid pontification, clichés, and melodrama.

Headings:

- Chapter number in 12 pt. Times New Roman, bold, italic, upper and lower case.
- Chapter name in 18 pt. Times New Roman, bold, italic, upper and lower case.
- Section headings in 12 pt. Times New Roman, bold, italic, upper case. The section heading should have a 18pt. spacing before and 12 pt. spacing following.
- Section subheadings in 12 pt. Times New Roman, bold, italic, upper and lower case.
- Finding headings in 12 pt. Times New Roman, bold, upper case, numbered by chapter and finding.
- Commendation and Recommendation headings in 12 pt. Times New Roman, bold, upper case.
- The actual commendation or recommendation statement in 12 pt. Times New Roman, bold, upper and lower case.
- Fiscal Impact headings in 12 pt. Times New Roman, bold, upper case.

Exhibits:

- Create in Microsoft Word or Excel.
- Bold exhibit number and title.
- APA (6th ed.) 4.15 requires all words of four or more characters as well as all verbs, including linking verbs, to be capitalized in Titles/subtitles. It also requires that all “major” words, regardless of length, be capitalized.
- Use trend data when available and appropriate.
- Use simple graphs and tables that are easily read and understood.
- Use 12.5% gray shading (or other shade as specified by the Office of Educational Quality and Accountability) to emphasize or highlight certain portions of exhibit. (Refer to most current reviews for samples.)
- Use light yellow color on basic color chart (or other color as specified by the Office of Educational Quality and Accountability) for the header of the exhibits.
- Use a light green shading (or other shade as specified by the Office of Educational Quality and Accountability) for the header of the Recommendation exhibit.
- Do not run an exhibit across pages; split the exhibit into two parts, use a smaller font to make the exhibit fit onto the page, or insert a page break leaving space at the end of the previous page.
- Use 11 pt. Times New Roman Normal font for text within the exhibit unless using 11 pt. font causes the exhibit to run onto the next page. (There are times when the Office of Educational Quality and Accountability will use 12 point font if there is space to do so. The smallest font that can be used in an exhibit is 9 point font.)
- Bold headings in rows and/or columns.
- Use a standard format for exhibits (e.g. survey responses, charts, graphs, tables, pictures)
- Use at least 3 inch by 3 inch color digital pictures to customize report and maximize impact of exhibits where applicable. (There are times when a picture will be resized by the Office of Educational Quality and Accountability in order to have it better fit a page.)
- Use 10 pt. Times New Roman italic font with no period at the end for sources below exhibits.
- Use 10 pt. Times New Roman italic font and complete sentences with a period at the end for notes, explanations, or * below source line on exhibits.

Ranking and Calculations:

- Rank elements of tables from highest to lowest.
- Align decimal places using left, center, decimal, or right justify functions; do not use tabs.
- Use district being reviewed in all rankings or calculations where applicable.
- In tables, have district being reviewed at the top in bold, followed by peer districts in alpha order (not bold), and then community group and state data in bold.
- Use the most accurate calculations available (e.g. rates, percent, percentage points).
- Avoid averaging averages, if possible.
- Use decimal points appropriate to the data and accuracy being presented.

Surveys and Focus Group and Forum Comments:

- Place survey results and forum comments in appendices of the drafts and final report.
- Use survey results and/or forum comments to support findings.
- Do not identify quoted sources or use individual names.
- Use the exhibit guidelines as stated above in the Exhibit section. This includes using the light yellow color for the header and 12.5% gray shading (or other colors and shades as specified by the Office of Educational Quality and Accountability) to emphasize or highlight certain portions of exhibit. (Refer to most current reviews for samples.)

General Format of Drafts and Final Report:

Each OSPR draft and the final report shall contain chapters, sections, headings, and subheadings and be organized in the following way:

Background. Each chapter, section, and subsection shall begin with a portion that provides general information on the topic being reviewed. There should be one background portion at the beginning of each chapter and one background portion per section of the chapters. Each background portion should be titled in bold italics and be one to three paragraphs in length, and may include subheadings (e.g. ***Demographics, School Board Member Training, Custodial Operations, etc.***)

Background portions may include the following information relative to the topic being reviewed:

- Historical background (e.g. how the county, town, district, or school got to this point).
- State or national perspective.
- Relevant state or national laws or district policy.
- Summary or examples of what school districts typically do.
- Current situation that impacts the school district.
- Exhibits that illustrate relevant information, trends, and/or background.

Finding. A finding provides the evidence for a commendation or recommendation. Each finding shall logically lead to a single, stand-alone commendation or recommendation. Each finding should be one to three paragraphs in length and include a heading (i.e. **FINDING 1-1**, etc.).

Findings shall include the following:

- Specific titles.
- The who, what, where, when, and how of the situation.
- Clear, concise, and accurate statements.
- Avoidance of individual names, rumor, pontification, and arcane language.
- Data and exhibits to support the finding (e.g. survey results, comparisons to peer districts, number of free/reduced-priced lunches served versus number of students eligible, mileage readings on buses that need to be replaced).

Commendation. A commendation identifies innovative, efficient, and/or effective district programs or practices that could serve as models for other districts. Each commendation shall be one to two sentences in length and include a heading typed in bold royal blue (the third selection down from the top in the blue column of the font color chart or as specified by the Office of Educational Quality and Accountability). Example as such: (i.e. **COMMENDATION**).

Commendations shall include the following:

- What action was/is taking place?
- Who was/is responsible for the action?
- What was/is the result of the action?

Recommendation. A recommendation should lead to substantive change through practical actions and avoid vague and lofty goals. Each recommendation shall be one to two sentences in length and include a heading typed in bold green (as specified by the Office of Educational Quality and Accountability). Example as such: (i.e. **RECOMMENDATION**).

Recommendations include the following:

- What actions need to take place?
- Who is responsible for the action?
- What is the anticipated result of the action?

Reasoning. Sound reasoning shall be used to explain the need for each recommendation. This portion shall follow a recommendation and does not need a heading. Each reasoning portion should be one to three paragraphs in length.

Reasoning portions shall include the following:

- Justification of why the recommendation is necessary.
- Anticipated results of implementation of the recommendation.
- Examples of similar situations in other school districts.
- Research to support the recommendation.

Implementation Strategy. The implementation strategy shall explain precisely what steps should be taken to implement a recommendation. This portion shall follow the reasoning for a recommendation and does not need a heading. Lengths of the implementation strategies vary based upon the scope of the recommendation.

Implementation Strategies shall include the following:

- Concise statements that explain who is to do what to implement the recommendation.
- Specific titles of the persons responsible for various actions.
- Logical steps to reach a desired result.
- Avoidance of strategies that call for a plan to plan a future action or development of processes to create processes, etc.

- Resources from which the district can find examples of implemented best practices which are the basis of the recommendation. These resources may include websites and/or titles of published reports, magazine articles, and/or books related to the recommendation. Web site references included in the report shall be in the “default blue” color.

Fiscal Impact. Each recommendation shall include a fiscal impact portion outlining savings or costs. Lengths of the fiscal impact portions vary based on scope of the recommendation. This section shall include a heading typed in bold black (i.e. **FISCAL IMPACT**).

Fiscal Impacts shall include the following:

- Methodology used to derive savings or costs.
- Accurate calculations based upon current data.
- A table showing the savings or costs over a five-year period.

Specific Notes

- Use smart quotes.
- Less jargon! (e.g. driving real time instruction) Use words that a non-expert will understand.
- Make sure exhibits are numbered consecutively (they get moved around a lot in the editing stage).
- Don’t create any forced page breaks until the final version.
- Photos should be 3” x 3”, color, with a solid line border (use picture border)
- Use "grade eight" or "eighth grade" The general rule is spell out all numbers one through ten and then use numbers for 11 or more. When referring to a grouping (e.g. 9th through 12th grade) use numbers rather than spelling it out.
- Use the Statutes citations (e.g. 70 O.S. § 1210.508) when referring to OK Education Laws.
- Paragraphs must have at least TWO sentences.
- Use 12pt “space after” on the paragraph formatting.
- Repeat long form of acronyms if you haven’t referred to them in more than two pages.
- Italicize titles of federal legislation (e.g. “No Child Left Behind” as “*No Child Left Behind*” or “NCLB” as “*NCLB*”).
- Sources should always have a month and year, with the exception of profile databases.
- Cited sources (e.g. research, journals, etc.): Sources cited in text should only have last names of authors with publishing year in parenthesis (2012). If source is not in footnote, then add the journal title within the text. Direct quotes from journals/online pdf MUST have page number from the cited source. Sources should be cited in APA format and should be written in such a way that they can be placed in a footnote.

- Sources for images should be as follows: *Source: VENDOR, [Month] [Year]*
- Place only one space after colons.
- Authors may also separate points with bullet lists. For lists that do not communicate hierarchical order or chronology, use bullets. The bullets should not begin with a capital letter; each bullet should end with a semicolon except for the last bullet in the list should end with a period. (APA 6th ed.) If the bulleted text is a complete sentence then begin with capital letter and end with period.
- If there is no fiscal impact for a recommendation, always write “This recommendation can be implemented with existing resources.” under the Fiscal Impact heading.
- Do not include cents in writing or exhibit figures. Always round to the nearest dollar (\$4,697.52 will become \$4,698).
- Do not make numbers in writing “accessible.” Ergo, do not write “four (4)”, write “four”.
- Use single-line spacing (this refers to the space between lines within a paragraph, NOT between paragraphs themselves).
- [The Gregg Reference Manual](#) (which I highly recommend) explains:

As a rule, nouns referring to inanimate things should not be in the possessive. Use an “of” phrase instead.

- the bottom of the barrel (NOT: the barrel’s bottom)
- the wording of the agreement (NOT: the agreement’s wording)
- the lower level of the terminal (NOT: the terminal’s lower level)

Editing Procedures:

- Draft 1 Edits – will include editor’s initials and word Edit in subject line
- Draft 2 Edits – will include editor’s initials and word Edit in subject line unless there are no edits and then it will say Final.
- Draft 3 Edits – will include editor’s initials and word Edit in subject line unless there are no edits and then it will say Final
- When a draft has the word final in the subject line then the vendor will need to review for QC. QC should be placed in the subject line by the vendor when returned to OEQA.
- QC = The QC document should not have any comments or editing notes on it. It should be a slick copy that is ready to be placed in a Read Draft for the Superintendent

Reviews performed for OSPR, should consider the following as standard:

Not Allowed	Use This Instead
“quoted text”.	“quoted text”.
bloodborne, blood borne	blood-borne
Board (as in “the Board...”)	board (as in “the board...”)
Board of Education	board of education unless there is a proper name preceding (e.g. Bristow Board of

Not Allowed	Use This Instead
	Education)
busses	buses
copius	something simpler
cross trained	cross-trained
cut off	cutoff
data driven	data-driven
data is	data are
decision making	decision-making
district wide, districtwide	district-wide
e-mail	email
follow up, followup	follow-up
Food Services, Food Service, Child Nutrition	child nutrition
footnoted text ¹ .	footnoted text. ¹
hand held	handheld
long range	long-range
long term	long-term
nascent	something simpler
on going	ongoing
on-site or on site	onsite
paper work	paperwork
pay check	warrant
preK, pre-K	Pre-K
pre-school	preschool
VENDOR found	the consulting team found
research based	research-based
school board	Maryetta School Board - otherwise no caps
short and long-term	short- and long-term (use two hyphens)
short term	long-term
staff are	staff is OR staff members are
Superintendent, Principal	superintendent, principal
testimony	something else
the consultant team, the consultant(s)	the consulting team
the review team	the consulting team
two spaces after a period	one space after a period
usage	use
walk through	walk-through
web site	website
23% of parents...	23 percent of parents...
numbers 0 through 10	zero through ten (spell out)
numbers eleven through six million one thousand six hundred forty-nine (or so)	11 through 6,001,649 (don't spell out)
2012-2013	2012-13
	K-12
	SMARTBoard only if it is; otherwise

Not Allowed	Use This Instead
	“interactive whiteboard”

Blue font (commendations and web addresses) is 0,0,255 (RGB)

Green font (recommendations) is 0,128,0 (RGB)

Yellow shading (exhibit headings and org chart coloring) is 255,255,153 (RGB)

Green shading (fiscal impact headings) is 204, 255, 204 (RGB)

Gray shading (table emphases and total lines) is 217, 217, 217 (RGB), or 15% (Grayscale)

Website font color is the default, which is 0,0,255 (RGB), [underlined](#)