



California Statewide Deemed Measures

Style Guide

VERSION 3.0

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Revision Log

| Version | Publish Date | Description of Revisions | Owner |
|---------|--------------|--|----------------------------------|
| 1.0 | 10/23/2018 | Initial version. | Jennifer Holmes, Cal TF Staff |
| 2.0 | 07/30/2020 | Added revision log. Added additional items in each chapter based to address common grammar, word, and number usage errors and inconsistencies. Added additional items to Commonly Used Industry Terms. Added Presentation citation example. | Jennifer Holmes, Cal TF Staff |
| 3.0 | 02/21/2022 | Added "Additional Resources" section and graphic Updated examples in side bar with red font to highlight the point being demonstrated. Updated Capitalization section, added rule for capitalizing the word "federal" Added section on use of italics, bold, and underline in body text Added correct use of "i.e." and "e.g." Updated commonly used industry terms to include Wi-Fi, midstream, downstream Added "measure package plan" and "nameplate" to commonly used terms Included guidance for a citation for a data file if the data is confidential Replaced logo on cover page Inserted TOC | Jennifer Holmes, Cal TF Staff |

Purpose

This **style guide** contains guidelines and writing conventions for developing the measure characterization text for a statewide deemed measure. These guidelines are intended facilitate standardization and ensure that all text within the measure characterization follows editorial and stylistic rules, such as (but not limited to) voice, word usage, number usage, commonly used terms, units of measurement, and abbreviations.

This guide is not intended to be exhaustive, rather it includes key topics and addresses common inconsistencies and common errors.

This guide is not intended to provide instruction for how to use the eTRM online application, how to insert measure characterization to the eTRM, or on the conventions that are specific to the eTRM.

This guide will be updated periodically as needed.

If a topic is not addressed in this guide, refer to the *Chicago Manual of Style* (<http://www.chicagomanualofstyle.org/home.html>).

Examples of are provided in the side bar with underlined red text to highlight a particular point.

Additional Resources

The figure below depicts the suite of resources and tools available for eTRM Users and those who are involved in developing, update, and reviewing energy efficiency measures for the California IOU and POU portfolios.

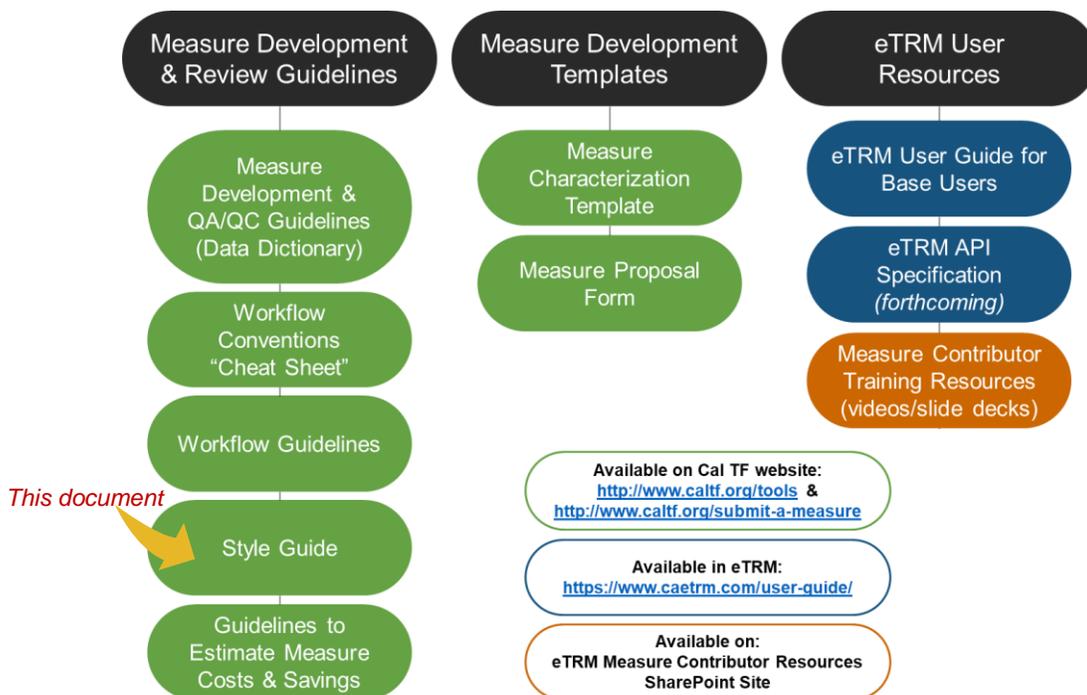
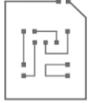


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Text and Word Usage

General

Text should be written in a professional tone for a broad professional audience. Technical and non-technical material should be presented and explained in a concise and easy to understand manner.

One space in between sentences.

Voice

Use third person.

Use active voice when possible and appropriate. Some passive voice is acceptable, depending on the context, but should be used sparingly.

Avoid contractions and colloquialisms, idioms, and slang.

Parallel Construction

Parallel ideas within a sentence should be phrased in grammatically parallel forms.

Text that presents or compares a list of ideas or concepts (i.e., typically in bulleted or numbered list) should be written in grammatically parallel form. Writing parallel lists means that each item in the list has the same structure. For example, each item in the list might:

Start with the same part of speech (noun, verb)

Use the same verb tense (present, past, future)

Use the same voice (active, passive)

Correct Use of “i.e.” and “e.g.”

The abbreviation “i.e.” stands for *id est*, which is Latin for “that is.”

The abbreviation “e.g.” stands for the Latin phrase *exempli gratia*, meaning “for example.” (Typically, “e.g.” will preface a list.)

A comma should follow both “i.e.” and “e.g.”

The “i.e.” or “e.g.” clause should be surrounded by parentheses or dashes.

The study recommendations are:

1. **Explore** how installation costs scale with equipment capacity.
2. **Conduct** regular, targeted market assessments to inform cost data collection strategies.
3. **Develop** standard data development and analysis procedures for measure cost estimation.

The final measure cost reflects the average supplier discount (**i.e.**, 20%).

Two building types (**e.g.**, motels and hotels) are excluded from program eligibility.

Capitalization

Word Capitalization

Do not capitalize common nouns (e.g. direct install program, low-income customers) unless it is the first word of a sentence.

Capitalize proper nouns (e.g. New Homes Program, Business Incentive Program, Southwest).

Capitalize words for which there is a registered trademark. (e.g., Bluetooth, Wi-Fi)

Capitalize the word “federal” only if used in a name of a federal agency or other proper noun.

Capitalize all words in headings and subheadings (all heading levels) unless the word is a preposition.

Acronyms

All letters in an acronym should be capital letters.

All acronyms should be spelled out the first time they are presented in a document or in a single measure characterization text field, followed by the acronym in parentheses. After the first occurrence, the acronym should be used instead of the full text.

The abbreviation for United States is U.S. not US.

The **E**nergy **S**avings **A**ssistance **P**rogram offers energy-saving improvements, such as **d**irect **i**nstall measures, to qualified **l**ow-**i**ncome customers.

The **F**ederal Trade Commission enforces U.S. antitrust laws.

The **f**ederal government is composed of three distinct branches: legislative, executive, and judicial.

Punctuation

Periods, Semicolons, and Commas

Periods and commas belong inside quotation marks.

Semicolons and colons go outside quotation marks.

A sentence that includes a list should have commas separating each list item, as well as a comma after the last item before the word “and” Or “or.”

A dependent clause should be separated with commas only when the information contained in the clause is not important for the overall meaning of the whole sentence. (If the sentence still makes sense if the clause is enclosed in parentheses, then the clause should be enclosed by commas.)

The word “that” can only be used for a clause that contains essential information and therefore is not preceded by a comma.

Each measure application type is distinguished by its baseline determination, cost basis, eligibility, **and** documentation requirements.

The discounted LEDs, **which** are sold through the mass market delivery channel, will be discontinued next year.

A refrigerator **that** is ENERGY STAR-qualified is more energy efficient.

Hyphenation

Hyphenate two or more words that precede a noun they modify and act as a single idea. See “Commonly Used Industry Terms” below.

whole-building energy simulation

single-family building type

low-income families are eligible for incentives

Apostrophes

Avoid contractions (“it is” instead of “it’s”).

Use apostrophes to form a possessive only if the noun is a person. (“the PG&E program” instead of “PG&E’s program”)

Placement of Footnote Reference Marks

Insert reference marks outside of punctuation, like this,¹ or at the end of a sentence.²

If possible, footnote references should be inserted at the end of the sentence.

(Rules for placement of footnote reference marks also apply for the placement of reference badges in the eTRM.)

Quotations

A typical quotation is enclosed in double quotation marks and is part of a sentence within a paragraph.

If a quotation takes up more than five lines, format it as a block quotation rather than as a regular quotation within the text of a paragraph. Block quotations are indented from the left margin with single line spacing.

Most of the standard rules for quotations apply to block quotes. A block quotation will begin on its own line (skip a line before and after the block quotation), it will not be enclosed in quotation marks, and its in-text citation will come after the ending punctuation.

Use of Italics, Bold, and Underline in Body Text

In body text, italics, bold, and underline are visual tools to emphasize key points and to visually distinguish specific parts of text from the surrounding text.

The uses of these tools are not interchangeable. For example, do not use italics to emphasize a point in one section and then use bold to emphasize key words in a different section.

These tools should be used sparingly; *over use will dilute their effectiveness.*

¹ Footnote text.

² Footnote text.

Italics

Italicize text for:

- Titles and names of particular works or objects (such as a report title)
- Block quotations (see Quotations).
- Foreign words
- For regular emphasis (sparingly)

The *2010-2012 W0017 Ex Ante Measure Cost Study Final Report* is no longer a source for measure cost data.

Do not enclose italicized text in quotation marks.

See Citations for Reference Material for guidance use of italics in reference citations.

Bold

In body text, bold is used to **highlight important phrases** and **key words**.

Bold is used for strong emphasis (sparingly).

As a general rule, the bold text should not exceed one line of text.

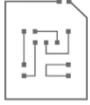
Underline

Because hyperlinks are underlined, do not underline body text for any other purpose.

Commonly Used Industry Terms

The adopted spelling/usage of commonly used industry terms are specified below (in alphabetical order). Even though some of these terms have more than one correct spelling or format, the terms below have been adopted for statewide deemed measures for consistency.

| Term Adopted | Not Adopted |
|--|---------------------------|
| airflow | air flow |
| coincident demand factor | coincidence demand factor |
| crawl space | |
| dew point | dewpoint |
| DOE-2 | DOE2 |
| downstream <i>(when referring to a delivery type)</i> | down stream |
| dry bulb | drybulb |
| ENERGY STAR | Energy Star |
| freeridership | free ridership |
| groundwater | ground water |
| horsepower | horse power |
| measure package | workpaper |
| midstream <i>(when referring to a delivery type)</i> | mid-stream |
| multifamily | multi-family |
| nameplate | name plate |
| nonresidential | non-residential |
| run time | runtime |
| setpoint | set point |
| single family single-family <i>(only if modifying a noun)</i> | singlefamily |
| showerhead | shower head |
| wet bulb | wetbulb |
| white paper | whitepaper |
| Wi-Fi <i>(always hyphenated, always capitalized)</i> | WiFi, wifi, wi-fi |



Number Usage

General

Spell out single digit numbers in text; use numerals for all other uses.

Spell out a number when a number begins a sentence (however, the preference is to rewrite sentence to avoid beginning with a number).

Always add a zero before the decimal point if the value is less than one. (0.01)

Use a comma in numbers to identify thousand, million, or greater values in text, tables, and figures.

In tabular format (or in a table), numbers shall be right-aligned so the decimal points are aligned.

Currency

If referring to a dollar amount in a table or figure, use both decimal places for zeroes (\$126.00).

If referring to a dollar amount in text, do not use decimal places for zeros (\$126). Use two decimal places for non-zero values (\$126.25)

Time

In text, format dates as Month Day, Year (May 22, 2011). Do not use forward slash (not 5/22/11).

Use a comma to separate the day of the month from the year. (May 22, 2011)

Do not use a comma to separate month and year. (May 2011)

Use the 12-hour notation for the time of day (11:00 p.m.).

Numbers should not be used to express noon or midnight, use “noon” or “midnight”.

Use small case letters followed by a period for “a.m.” and “p.m.”

No space before and after a colon (12:30).

Decimals and Percentages

Use % symbol instead of the word “percent”.

No space between a number and percent symbol (54%).

In tabular format (or in a table), values of the same unit shall have the same number of decimal places.

Common Units of Measurement

In text, spell out units if no quantity is indicated.

Use a hyphen between a number and the unit if it is modifying a noun.

Insert a space between a number and the unit (45 W, 100 kW, 1 hp) if it is not modifying a noun.

Insert a space between a number and degree symbol. (180 °F)

The weight is recorded in **kilograms**.

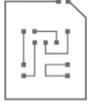
The **45-W lamp** is no longer eligible.

A **1-hp motor** is not the same as two **0.5-hp motors**.)

Common units of measurement and the adopted abbreviations for the measure characterization text are provided below. If a unit is not specified below, refer to the ASHRAE Units Policy at <https://www.ashrae.org/resources--publications/handbook/the-si-guide>.

| Unit of Measurement | Adopted | Example | Not Adopted |
|---|-----------------|-----------------------|-----------------------------------|
| Annual Fuel Utilization Factor (expressed as a percentage, or a decimal, but must be consistent throughout) | AFUE | 90% AFUE 0.90 AFUE | |
| British thermal unit | Btu | 10,000 Btu | BTU |
| British thermal unit per hour | Btu/hr | 200,000 Btu/hr | Btuh BTUH |
| British thermal units x 1,000 | kBtu | 200 kBtu | MBTU MMBTU MMBtu |
| British thermal units per hour x 1,000 | kBtu/hr | 200 kBtu/hr | kBTUH Kbtuh kBtu/h Mbtuh |
| Coincident demand factor | CDF | 0.9 CDF | |
| Combustion efficiency (expressed as a percentage) | CE | 85% CE | |
| Cubic feet | ft ³ | 10 ft ³ | cu. ft. |
| Cubic feet per minute | cfm | 5,000 cfm | CFM |
| Degrees Fahrenheit | °F | 180 °F | |
| Degrees Celsius | °C | 20 °C | |
| Dew point | DP | | |
| Dew point temperature | DPT | | |
| Dry bulb temperature | DBT | | |
| Energy factor (expressed as a decimal) | EF | 0.84 EF | |
| Gallons | gal | 10 gal | |
| Gallons per minute | gpm | 10 gpm | GPM |
| Gallons per rack | GPR | | gpr |
| Horsepower | hp | 3 hp | HP |
| Kilolumen | kLm | | KLM, klm |
| Kilowatt | kW | 1 kW | kw |
| Kilowatt hour | kWh | 100 kWh | kwh |
| Linear feet | ln-ft | 3 ln-ft | |
| Lumens | lm | | LM |
| Lumens per watt | LPW | 68 LPW | lm/W |
| Lumen power density | LPD | | lpd |

| Unit of Measurement | Adopted | Example | Not Adopted |
|--|-----------------|---------------------|--------------------|
| Megawatt | MW | 2 MW | mw |
| Pound | lb | 10 lbs | LB Lb |
| Pounds per square inch | psi | 50 psi | lb/in ² |
| Square feet | ft ² | 100 ft ² | sqft. |
| Thermal efficiency (expressed as percentage) | TE | 90.0% TE | te |
| Uniform energy factor | UEF | 0.64 UEF | uef |
| Volt | V | 10 V | v |
| Watt | W | 15 W | w |
| Wet bulb temperature | WBT | WBT of 58 °F | wbt |



Citations for Referenced Material

Citations for different reference types vary; however, the standard citation elements and the order in which they appear are as follows:

Author(s). Year. *Publication Title*. "Article Title." City (State): Publisher. Month Day. Page Number(s).

The first author is listed as last name first, first name abbreviation. Subsequent authors are listed with abbreviated first name, last name.

(Friedman, H., E. Crowe, E. Sibley, and M. Effinger.)

If the date of publication is unknown, use (n.d.) in place of the year.

The title of a report, book, or volume should be italicized.

The title of an article or chapter within a report or book should be within quotes.

Examples of full citations for common reference types are provided below. If not specified, refer to the Scientific Style and Format (<http://www.scientificstyleandformat.org/Tools/SSF-Citation-Quick-Guide.html>).

Refer to the *Statewide Measure Development and QA/QC Guidelines* (available at <http://www.caltf.org/tools>) for guidelines on appropriate documentation of inputs, assumptions, data, and other information utilized for measure development.

Book or Report

Author(s). Date. *Title*. Edition. Place of publication: publisher. Pagination, report number (optional).

American Society of Heating and Air Conditioning Engineers (ASHRAE). 2014. *ASHRAE Guideline 14–2014: Measurement of Energy, Demand, and Water Savings*. ASHRAE.

American Society for Testing and Materials (ASTM). 2014. *ASTM F1275-14, Standard Test Method for Performance of Griddles*. West Conshohocken (PA): ASTM International.

Friedman, H., E. Crowe, E. Sibley, and M. Effinger. 2011. *The Building Performance Tracking Handbook*. California Energy Commission (CEC). Portland (OR): Portland Energy Conservation, Inc.

U.S. Census Bureau. 2016. *Populations of the States and Counties of the United States*. Washington, DC: US Census Bureau.

Torvestad, G. and N. Stone. (Benningfield Group). 2014. *Unique Multifamily Buildings Proposed Energy Code Measures, Final Project Report*. California Energy Commission. CEC-500-2015-045.

White Paper

Author(s). Date. *Title*. Place of publication: Publisher.

Oster, J., T. Guiterman, and M. Rigney. 2015. *Transforming Energy Efficiency through Modern Measurement*. Seattle (WA): EnergySavvy.

Utility Workpaper

Utility name. Year. *Workpaper Title*. Month day.

Pacific Gas and Electric (PG&E). 2016. *Work Paper PGEREF108: Anti-Sweat Heat (ASH) Controls Revision #7*. November 8.

Data File Reference (.xls, .zip, .png)

Organization or Author. Year. "<filename>." Month day.

Food Service Technology Center (FSTC). 2016. "Ovens 2016 Price Update.xlsx."

Southern California Edison (SCE). (n.d.) "Walk In Cooler Evap Fan Controller eQUEST model files.zip."

Data File Reference for Confidential Data

A reference is required to cite the use of a file containing confidential data (personal identifying information, competitively sensitive data, etc.). However, *the file with confidential data shall not be uploaded to the eTRM reference library*.

Organization or Author. Year. "<filename>." Month day. Proprietary data.

Southern California Edison (SCE). 2019. "FMC_IMC Analysis_CONFIDENTIAL.xlsx." Proprietary data.

Journal or Periodical Article

Author(s). Date. "Article title." *Journal title*, Volume (issue): start page – end page.

Grueneich, D. 2015. "The Next Level of Energy Efficiency: The Five Challenges Ahead." *Electricity Journal*, 28 (7): 44-56.

Paper in Conference Proceedings

Author(s). Year. "Paper title." *Proceedings title*, Volume: start page – end page. Place of publication: publisher.

Bode, J., L. Carrillo, and M. Basarkar. 2014. "Whole Building Energy Efficiency and Energy Savings Estimation: Does Smart Meter Data with Pre-Screening Open up Design and Evaluation Opportunities?" *Proceedings of the ACEEE 2014 Summer Study on Energy Efficiency in Buildings*, 4:36–49. Washington, DC: American Council for an Energy-Efficient Economy (ACEEE).

Presentation

Author(s). Year. "Presentation title." Presented at <conference or meeting title>, meeting location. Month day.

CPUC Disposition

California Public Utilities Commission (CPUC), Energy Division. Year. "Disposition title." Month day.

California Public Utilities Commission (CPUC), Energy Division. 2012. "Workpaper Disposition for Integral LED Lamp Replacements." May 14.

Memo

Author(s). Year. "Memo subject." Memorandum submitted to <Recipient>.

EMI Consulting. 2016. "2016 PG&E Retail Products Platform (RPP) - Air Cleaners Hours of Use Research Results" Memorandum submitted to PG&E.

Websites and Other Online Formats

Title of homepage. Date of publication. Edition. Place of publication: Publisher; date update; date accessed.

FERC (Federal Energy Regulatory Commission). 2014. "Smart Grid." October 24.

Google. 2017. "Privacy Policy." Privacy & Terms. Last modified April 17.
<https://www.google.com/policies/privacy/>.

Database - Online

NASA/IPAC Extragalactic Database. 2016. Object name IRAS F00400+4059. Accessed April 6.
<http://ned.ipac.caltech.edu/>.

Standards

National Information Standards Organization. 2010. *Bibliographic References*. ANSI/NISO Z39.29-2005. Bethesda, MD: NISO, approved June 9, 2005; reaffirmed May 13, 2010.

Federal/State Laws, Statutes, Regulatory Rulings, Decisions, Resolutions

California Public Utilities Commission (CPUC). 2015. *Decision on Residential Rate Reform for Pacific Gas and Electric Company, Southern California Edison Company, and San Diego Gas & Electric Company and Transition to Time-of-Use Rates*. Decision 15-07-001. Rulemaking 12- 06-013. Issued on July 13.

Pennsylvania Public Utility Commission (PAPUC). 2012. "PA Public Utility Commission Final Order in Docket Nos. M-2012-2300653 & M-2009-2108601, Total Resource Cost Test: 2012 Phase II of Act 129." Pennsylvania Public Utility Commission. August 30.

Federal Energy Regulatory Commission (FERC). 1980. Order 69. 18 CFR 292. Federal Register 45: 12214–12237. February 25.

Federal Trade Commission (FTC). 2014. Credit Practices Rule, 16 CFR 444.1.

Personal Communication (in person, written, email, social media)

Personal communications include conversations, interviews, lecture material, telephone conversations, letters, e-mail messages, and social media posts.

Citations for personal communication are not published in the measure or in the reference library, nor will they appear on a reference list because they do not contain “recoverable data” or provide “evidentiary support” to a fact, data, or claim.

Personal communications are to be cited in the text only, in-line with the body text. *Permission is required.*

The standard format for a personal communication citation within the body text is shown below:

Respondent Lastname, Firstname. (organization/affiliation). Year. <type of communication> with <initiator first name lastname>. Month Day.

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aliquam elementum, libero at commodo viverra, ipsum mi gravida nisi, vel venenatis ligula nulla at risus. Donec sed sem urna. Fusce id nulla a ipsum dapibus porta. Integer convallis est sit amet nulla vulputate interdum. (Ruth, B. 2018. E-mail communication with B. Posey, August 14.)