Chicago Manual *of Style*

GUIDELINES

Introduction
- This is a brief guide to **Chicago style**, the rules for manuscript preparation laid out in the *Chicago Manual of Style* (CMS)
- This guide is based on the rules and guidelines provided in CMS 16th edition; the University of Chicago Press, the publisher of CMS, periodically releases new editions, which may include additions or adjustments

What Is CMS?
1. CMS defines the editorial style of the University of Chicago Press, a major publisher of academic books and journals; the press has published its style guide in various editions since 1906
2. Over time, other publishing organizations have adopted CMS rules for their own work
3. The flexibility and expansiveness of the rules make CMS style useful for a number of contexts, including academic research papers and business reports, as well as published manuscripts

Preparing a Manuscript
1. The rules that follow are typical requirements
2. Different contexts will have different requirements; always consult your professor or publisher for specifics

General Document Layout
1. Use one-inch margins; set text flush left and double-spaced with no extra lines between paragraphs; indent the first line of paragraphs one-half inch
2. All headings and subheadings should be set at the margin, distinguished from each other by use of type size and styling (i.e., **bold** or *italics*)
3. Titles and headings use headline-style capitalization (Initial Capitals, not ALL CAPITALS)
4. Use italics where italics are meant, not underlining
5. Where possible, use word-processor functions to indent paragraphs and format lists; avoid using spaces, tabs, or extra returns, and turn off automatic hyphenation

Illustrations, Tables & Charts
1. **Illustrations** include artwork or any other presentation in images rather than in text or numbers, such as maps or charts; **tables** are complex lists presented in columns and rows
2. Illustrations, charts, maps, and other graphical representations are typically grouped together and referred to as **figures**
   3. All figures and tables are numbered and referred to in the text by number; figures and tables are numbered separately (Figure 1, Table 1, Figure 2, Table 2, etc.)
4. Figures and tables must be referred to in the text and must have descriptive captions; captions appear above tables but below figures
5. Notes for tables and figures are numbered separately from notes for the larger manuscript and appear just below the table or figure (for figures, above the caption); source notes also appear with the table or figure, above other notes
6. Column heads and labels in tables should be as brief as possible to minimize clutter; abbreviations and symbols are allowed

Copyright & Fair Use
1. **Copyright** is a complex legal area, as are the permissions that must be obtained to reuse parts of previous works in a published book or article; if you are writing for publication, consider working with an experienced permissions editor
2. Most academic uses of other works are likely to fall under the **fair use doctrine**; fair use allows small excerpts from other copyrighted works to be used for the purposes of criticism, analysis, or evidence
3. **Paraphrasing** does not escape copyright law; extensive paraphrasing is subject to the same copyright and fair use limitations as direct quotation
4. All uses, whether under fair use or by permission, must be properly referenced and cited to avoid plagiarism (*see* **Documentation**, p. 4)
5. See the **Quotations** section (p. 4) for advice about how to punctuate and format quotations from other works

Fair Use
1. The University of Chicago Press (UCP) makes its definition of "fair use" available on the web (http://www.press.uchicago.edu/Misc/Chicago/permissions.html); the following suggestions are adapted from both that source and CMS
2. Rules of thumb such as those outlined here are not part of copyright law and have no legal force; the following are intended only to provide some guidance
3. The key consideration in determining whether a use is fair use is whether the use in some way transforms or recontextualizes the original rather than merely appropriating it; quotation to critique an argument, or to support an original argument, is fair use, but the same amount of quotation merely to repeat the argument may not be
4. Fair use allows reuse of only small portions of a work and *never* a complete work, no matter how short; the UCP guidelines specify no more than 5 percent or 5,000 words, whichever is less
5. Quotations should be short—no more than a few paragraphs of a long work or a few lines of a poem—and should be interspersed with original text

Style & Usage
1. Do not confuse common usage with good usage—when in doubt, look it up!
2. This section provides a basic overview; usage guides, such as *Garner's Modern American Usage*, may also be helpful
3. CMS recommends *Merriam-Webster's Collegiate Dictionary* to resolve usage and spelling issues (*see* **Tricky Words**, p. 2)

Bias-Free Language
1. **Bias-free language** refers to both gender-neutral language and language describing people with disabilities, people from particular cultures or ethnic groups, and others
2. The goal is not political correctness but rather avoiding unintentional judgments, preserving credibility, and achieving maximum clarity
3. As a rule, use adjectives, not nouns (e.g., "a deaf person," not "a deaf-mute"; "a Jewish man," not "a Jew")
4. Some groups advocate the use of **"person-first" language**; this is rarely offensive and should be preferred where it does not create very awkward sentences (e.g., "a child with autism," not "an autistic child"; "a person who stutters," not "a stutterer")

Tactics for Achieving Gender Neutrality
Although the use of *they* and *their* as first-person pronouns has become common in informal speech, it is not acceptable in formal American English, and *he/she* or *s/he* constructions are distracting and awkward; instead, try these tactics:
1. Omit the pronoun
   Before: The student should carefully review the assignments when they are sent to him.
   After: The student should carefully review the assignments when they are sent.
   2. Use a plural noun
      Before: The teacher should update the gradebook when she receives the papers.
      After: Teachers should update their gradebooks when they receive the papers.
3. Use an article instead of a pronoun
   Before: The author should review his pages carefully.
   After: The author should review the pages carefully.
4. Substitute a neutral pronoun
   Before: A teacher in a wealthy school is likely to have more access to computers than she will in a poorer district.
   After: A teacher in a wealthy school is likely to have more access to computers than one in a poorer district.
5. Use a *who* construction rather than an *if* construction
   Before: If a student is accused of plagiarism, he must appear before the discipline board.
   After: A student who is accused of plagiarism must appear before the discipline board.
6. Use the passive voice to avoid a pronoun
   Before: The manager will forward the e-mail as soon as she receives it.
   After: The manager will forward the e-mail as soon as it is received.
7. Use *he or she*
   Before: If a student is accused of plagiarism, he must appear before the discipline board.
   After: If a student is accused of plagiarism, he or she must appear before the discipline board.
8. Repeat the noun instead of using a pronoun
   Before: The student should speak only when he is called on.
   After: The student should speak only when the student is called on.

Punctuation
1. All punctuation should be styled like the main or surrounding text unless it belongs to the styled matter (e.g., it is part of a title)
2. Periods and commas fall inside closing quotation marks; all other punctuation marks fall outside the closing quotation mark unless they are explicitly part of the quoted material
3. Always use one space between sentences and after colons, not two
4. Use normal punctuation with URLs and e-mail addresses
5. The discussion that follows uses some basic grammatical terms (*see* **An Introduction to Grammar**, p. 3)

Commas
Use commas:
1. To separate items in a series or list; **NOTE:** CMS style strongly encourages the use of what is called the **serial comma**—the comma between the next-to-last item in a list of three or more items and the word *and*—to ensure clarity
   EX: The agenda included a brief introduction**,** a talk by an invited speaker**,** and a brief question-and-answer period, followed by a reception.