

IEA Style Guide

**Guidelines on styling copy
for publications produced
by and for IEA**

(second revised edition)



International Association
for the Evaluation of
Educational Achievement

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International Association
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INTRODUCTION

Welcome to this second edition of the *IEA Style Guide*. The aim of the guide is to ensure that all documents (both printed and electronic) produced and published by and for the International Association for the Evaluation of Educational Achievement (IEA) are written to a consistent style, so bringing uniformity to IEA publications and aiding communication between author and reader.

Style refers to the forms of spelling, grammar, punctuation, and other elements of language and layout that a publisher or organization wants its writers to follow. These “other elements” include the following:

- Abbreviations
- Bibliographic referencing and reference lists
- Capitalization
- Footnotes and notes
- Headings
- Hyphenation
- Italics
- Numbers
- Material from others (permissions and quotations)
- Series and lists
- Statistical and mathematical copy
- Tables and figures.

This guide sets down IEA’s preferences in relation to these elements as well as in relation to spelling, grammar, and punctuation. It also sets out guidance for authors on presenting written and illustrative copy to IEA.

The content in this revised edition reflects changes over recent years in digital preparation and dissemination of publications. It also provides new content on various writing-related concerns, such as commonly misused words and grammatical errors. These additions all pertain to errors that have appeared in content submitted to IEA since publication of the first edition of the guide. Other updates pertain to American Psychological Association (APA) conventions (see below), including the styling of bibliographic references.

Section One of the manual provides general standards for presentation of copy (written and illustrative) for IEA publications, both print and electronic. Sections Two, Three, and Four cover respectively spelling, grammar, and punctuation. Section Five provides guidelines on the other elements listed above, except for reference lists and bibliographies, which are covered in Section Six. Section Seven focuses on IEA’s commitment to protecting intellectual property, both its own and that of other parties. The section therefore contains important information on copyright adherence and acknowledging the sources of content other than your own. The section ends by setting out

IEA's expectations with respect to use of its logo. Appendices provide examples of preferred spellings, hyphenation, and abbreviations, as well as a listing of the world's countries, with IEA's members highlighted.

The guidelines offered are not a comprehensive list of all possible variations and preference for any one feature. Rather, they provide general principles (with examples) for each. Also, the publishers or agencies responsible for producing IEA texts in published form may change some of the styling requested here (such as headings and the presentation of tables) to suit the layout determined for the published text.

The style set down in these pages aligns with that detailed in the sixth edition of the American Psychological Association's (APA) *Publication Manual*, published in 2010 and widely used around the world for English-language publications in the social sciences (see <http://www.apastyle.org/>). We strongly recommend that authors use the APA manual in association with this present guide, as the former provides considerably more detail than that given here. The manual can be bought in print form or downloaded in pdf format from the American Psychological Association's website: www.apa.org

Some users of this manual will still have on hand the fifth edition of the APA manual (published in 2001), which provides more comprehensive coverage than the sixth edition of many of the style elements considered in this IEA guide. The sixth edition is particularly useful for considerations relating to electronic (digital) content, such as preparing texts for posting on websites. Where applicable in this guide, we cite the sections or pages in both the fifth and sixth editions of the APA manual that give guidance additional to that given here.

The APA manual also provides valuable information on:

- Types of research-based writing (e.g., literature review, theoretical article, report of an empirical study) and the conventions associated with them (Chapter 1, fifth and sixth editions)
- How to structure research publications (Chapter 1, fifth edition; Chapter 2, sixth edition)
- The principles and practice of good writing (Chapter 2, fifth edition; Chapter 3, sixth edition)
- Ethical and legal standards in publishing (Chapter 1, sixth edition).

While past authors and editors of IEA publications used either American-based or British-based language conventions, IEA now adheres to American usage in step with APA conventions. The standard authority on American spelling is the *Merriam-Webster Collegiate Dictionary* (11th edition), which can be searched online (go to: <http://www.merriam-webster.com>).

Other useful references include:

- *The Chicago Manual of Style* (15th edition, Chicago University Press, 2003), also searchable online. Go to: <http://www.chicagomanualofstyle.org/home.html>
- *The New Oxford Style Manual* (Oxford University Press, 2nd ed., 2012)
- *New Hart's Rules: The Handbook of Style for Writers and Editors* (Oxford University Press, 2005).

Each of these provides valuable advice on writing and structuring books, articles, and reports. They also provide information additional to that in the APA manual on the following:

- Styling mathematical, statistical, and scientific copy
- Using languages other than English in English texts (including use of diacritics)
- Indexing
- Copyright, ethical standards, and other publishing-related responsibilities.

Authors using either of the two Oxford (UK-based) publications should follow US-based conventions regarding spelling, punctuation, and idiom.

The following statement from an internet website captures our intentions for this style guide.

Language is forever changing, and authoritative absolutes invariably come crashing down in the face of popular usage. These guidelines are therefore not definitive; we do not claim that they are perfect, or that they are the only possible ways of using the English language. For the time being, however, they are the principles to which we intend to conform, in the spirit of establishing standards and consistency in the absence of, or until something better comes along. We anticipate that these guidelines will change and grow over time. We welcome all feedback, suggestions, examples and topics for inclusion.

(Retrieved from <http://www.bolton.ac.uk/elab/guidelines/grammatical.html>)

**SECTION
ONE**

**General Standards
for Presenting Copy**

(text and illustrative material)

1.1 Setting out text and illustrations

The following requirements relate to both hard (printed out) and electronic (online) copy.

IEA's preference is for copy prepared as doc, docx and rtf files.

Text

1. Prepare your text as simply and cleanly as possible. Avoid the pitfall of setting out your text as you think it should or will look in final typeset form. For example, even if you think your main text should be set in two columns on each page, prepare your text in one column only. However, you can use typography to convey the “weighting” of section headings, that is, to indicate which section is subsidiary to which. For further guidance on headings, please see Section 5.4 on page 53.
2. Use a clear, standard, serif typeface, preferably Times or Times New Roman, with 12-point for the body text. Where preferred, you can use, in addition to Times and Times New Roman, specialist fonts for statistical, tabular, and other illustrative copy. We advise use of a sans serif font (e.g., Arial) and a nonproportional font (e.g., Courier) to distinguish the literal text of computer programs from main body text. A sans serif font is a font that does not have serifs, the small lines at the end of characters. A nonproportional font is a font whose letters and characters occupy the same amount of horizontal space.
3. Set the width between lines at either double-line spacing or 1.5-line spacing.
4. Do not put double spaces after full stops ending sentences, as only one space is used in typeset copy.
5. Have good margins (2.5 to 3 cm) at the top, bottom, and sides of each page.
6. Provide a header or footer on each page that gives the name of the publication, the page number, and its “stage” in the writing process (e.g., Draft 1, Draft 2, Final Copy).
7. Begin each new chapter on a new page (or as a separate file for online copy).

Illustrations

8. As noted above, in addition to using Times and Times New Roman for tables and figures, you can use specialist fonts for illustrative copy. Two good typefaces for tables, for example, are Arial and Helvetica. Font sizes of the text in tables and figures should ideally be between 8 and 12 points in size.
9. Do not present tables and figures prepared with specialty software packages (e.g., Excel, PowerPoint, CorelDraw) as images (e.g., eps, jpeg, tiff) because their content cannot be accessed for editing and formatting (e.g., made larger or smaller).
10. Provide all other illustrations, such as photos, as jpeg, *not* tiff, files.
11. Save images at a minimum resolution of 300 dots per inch (300 dpi). This size is comparable to print size. If the image supplied is smaller than this, the resolution can be made greater. If the image is larger than this, the resolution should be lower. Any image quality option should be set to maximum quality.
12. Place tables and figures on pages separate from the main body of the text (and as separate files in online copy), but indicate their approximate placement in the main body of the text (see Section 5.11 for more guidance on this method).

Electronic files containing text and/or illustrations

13. Label all electronic files with the title of the document, the part of the document (e.g., Chapter 1), and which version (e.g., Draft 1, revision 1, final copy).
14. Make sure that you remove all tracked changes and inserted comments from copy ready for print- or e-production.

1.2 Standard sections of a research article for a periodical

Refer APA manual (Chapter 1, fifth edition; Chapter 2, sixth edition)

In order, these are:

1. Title
2. Author (or authors') names
3. Abstract (journal article)
4. Executive summary ("one-off" report)
5. Introduction
6. Review of relevant literature
7. Method
8. Results
9. Discussion
10. Conclusion and implications

11. Reference list
12. Appendix/es (rare in journal article).

1.3 Standard sections of a book

In order, these are:

1. Half-title (main title of book)
2. Title page (title and subtitle of book, authors' names, publisher's imprint)
3. Title verso (edition information, including date of publication, copyright details, ISBN, publisher's address details)
4. Dedication
5. Acknowledgments
6. Foreword (introducing the author, and usually written by someone else)
7. Preface (written by the author/s, introducing the book and stating its purpose)
8. Contents
9. Lists of tables, figures, maps, etc.
10. Introduction
11. Chapters
12. Appendices
13. Notes
14. Reference list or bibliography
15. Index

Note: Not all books will include all these sections, although all will have a title page and title verso in addition to a table of contents and the chapters.

**SECTION
TWO**

**Spelling and
Vocabulary**

As mentioned in the introduction to this guide, the *Merriam-Webster Collegiate Dictionary* (11th edition) provides the standard spelling reference. Reference may also be made to the more comprehensive, *Unabridged*, (<http://unabridged.merriam-webster.com/>).

If the dictionary offers two or more spellings for a word, use the first one. English spellings are notoriously idiosyncratic, so it is difficult to provide “rules.” Although the following examples offer guidelines, there are always exceptions, which is why reference to a dictionary is so necessary.

Appendix 1 provides a list of words that further illustrate the following conventions.

2.1 American (US) and British (UK) variations

Use:

- **ize/iza** (US, UK) rather than **ise/isa** (UK) in words such as *standardize* and *standardization**
- **ze** (US) rather than **yse** (UK) in words such as *analyze*
- **or** (US) rather than **our** (UK) in words such as *behavior*
- **og** (US) rather than **ogue** (UK) in words such as *dialog*
- **er** (US) rather than **re** (UK) in words such as *center*
- **e** (US) rather than **ae** (UK) in words such as *maneuver* and *encyclopedia*
- **ense** (US) rather than **ence** (UK) in words such as *defense*.

Note: *If any of the uses form part of an actual name, keep the original spelling (e.g., Organisation for Economic Co-operation and Development).

Other common differences

1. UK and US English have seemingly contradictory approaches to doubling the final “l” of a word before adding suffixes such as *ment*, *ful*, *ing*, *ed*, *en*, *est*. In general, UK-based English doubles the “l” if the final syllable of the root word is *not* stressed, whereas US English usually only doubles the “l” if the final syllable is stressed. Thus, *travelled* and *woollen* (UK) but *traveled* and *woolen* (US) as nonstressed examples; *rebell~~l~~ing* and *revell~~l~~ing* (both UK and US) as stressed examples. Also, UK English usually doubles the *l* before suffixes starting with a vowel but does not do so if the suffix starts with a consonant (hence *skilful* and *fulfilment*), whereas US English doubles the *l* for both vowel and consonant (*skillful* and *fulfillment*). Differences may also occur in relation to verbs created from common nouns, for example, *trial* to *triated* and *trialling* (UK), but to *trialed* and *trialing* (US).

2. When adding a suffix to a word ending in e, UK spellings tend to retain the e while US spellings usually drop it. Examples include *judgement/judgment*, *ageing/aging*. However, there are many exceptions, with both the UK and US dropping the e (e.g., *lovable* and *believable*) or retaining it in words that need to keep a soft c or g sound (e.g., *changeable*).
3. UK English can have different spellings for the verb and noun forms of the same word, while the US tends to have only one for both forms. A common example is *practice* (noun) and *practise* (verb) in UK English, but just *practice* (noun and verb) in US English.
4. Spellings pertaining to the different forms (e.g., tenses) of some verbs also differ between the two countries. For example, the past tense and past participle versions of the verbs *burn*, *learn*, *dream*, and *spoil* are *burnt*, *learnt*, *dreamt*, and *spoilt* in UK English but *burned*, *learned*, *dreamed*, and *spoiled* in US English.

For more guidance on these differences and the reasons for them, refer to the following websites:

- <http://www.oxforddictionaries.com/words/british-and-american-spelling>
- <http://grammarist.com/spelling/>
- <http://www.tysto.com/uk-us-spelling-list.html>

2.2 Singular/Plural forms

Some examples:

appendix (sing.)/appendixes (pl.)	focus/focuses
bureau/bureaus	index/indexes or indices (for books)
census/censuses	matrix/matrixes or matrices
criterion/criteria	medium/media*
curriculum/curricula	phenomenon/phenomena
datum/data*	syllabus/syllabuses

Note: *Plural nouns take plural verbs (e.g., “The criteria are clear”). However, there are exceptions. Data and media sometimes take the singular form. *Data* is singular when used synonymously with “information”, plural when used synonymously with “facts.” The word *media* frequently takes singular form when used to encompass newspapers, television, film, etc.

2.3 Computer terminology

Computer terminology changes so quickly that deciding which words to include and which spellings (including capital letters) to use is difficult. However, use for IEA publications is as follows:

CD (compact disk)	interface
CD-ROM (compact disk, read-only-memory)	internet
cloud computing	intranet
compact database	input (noun and verb)
cyberspace	iPad
database	iPhone
data management	iPod
data type	Java
desktop publishing	JavaScript
digital	jpeg (joint photographic experts group)
digitize	laptop (computer)
disc (for optical media)	log file
disk (for magnetic media)	logoff
download	login
DVD (digital versatile disk)	logon
ebook	logout
ecommerce	metadata
email	metafile
Excel	MP3
Facebook	multimedia
file	multiplatform
filename	multiprocessing (noun)
file type	offline
flash drive	online
Google (noun)	Open Firmware
google (verb)	open source
gif (graphics interchange format)	operating system
hard copy	output (noun and verb)
hard disk	overwrite
hard drive	pdf (portable document format)
hardware	plain text
host	platform
hyperlink	png (portable network graphic)
hypermedia	podcast
hypertext	PostScript
home page	PowerPoint
hyperlink	program (noun and verb)
hypertext	programmer

programming
raw data
raw file
rich text
rtf (rich text format)
runtime
shareware
sitemap
smartphone
social networking
software
spell check (verb)
spellchecker (noun)
source code
spreadsheet
standalone
storage capacity
storage device
subdirectory
system analyst
system requirements
system resources
system software
tablet
tag
telecommunications
template
text editor
thumbnail
tiff (tagged image file format)
toolbar
troubleshooting
tweet
Twitter
upload (noun and verb)
URL (uniform resource locator)
user interface
username
usenet
virtual memory
virtual reality
W3C (world wide web consortium)
web browser
webmaster
web (the)
web host
web page
wifi
wiki
Windows (Microsoft)
Windows Vista
Windows XP
word processor (noun)
wordprocessing (verb)
world wide web (the)
WWW (world wide web)
WYSIWYG (what you see is what you get)
Yahoo!
YouTube
zip file
zone file

2.4 Hyphenation

Refer Section 3.11, fifth edition of the APA manual; Section 4.13 of the sixth

Many other spelling questions are concerned with compound words. These are two or more words written as either (a) one unbroken word, (b) a hyphenated word, or (c) two or more separate words. Should it be *agemate*, *age-mate*, or *age mate*? The dictionary answers many such questions (it is *age-mate* in this case), especially for nonscientific words. But because language is constantly changing and expanding, especially in the physical and social sciences, dictionaries may not include an authoritative spelling for the new compounds common to these fields. If a compound is not in the dictionary, the following general principles of hyphenation provide guidance.

- **Principle 1:** Do not use a hyphen unless it serves a purpose. If the meaning of a compound is clear, a hyphen is not necessary (e.g., least squares solution, semantic differential techniques).
- **Principle 2:** When an invented or temporary compound is used as an adjective before a noun, it is sometimes hyphenated to avoid ambiguity. For example, consider “different word lists.” Does this refer to (a) lists composed of different words, or (b) word lists that are different from other word lists? A properly placed hyphen helps the reader understand the intended meaning.
- **Principle 3:** Most rules pertaining to adjectives are appropriate only when the compound adjective precedes the noun. If a compound adjective follows the noun, relationships are usually sufficiently clear without the hyphen (e.g., “client-centered counseling” *but* “the counseling was client centered;” “*t*-test results” *but* “results from *t* tests”).
- **Principle 4:** Words formed with prefixes are usually written as one word (e.g., *aftereffect*, *pseudoscience*, *underdeveloped*), but some require hyphens:
 - when the base word is a capital (pro-Freudian), a number (post-2006), an abbreviation (pre-UCS trial), more than one word (non-achievement-oriented students)
 - to clarify spelling and meaning (re-pair, as in pair again; re-form, as in form again; un-ionized)
 - to avoid awkward double vowels (anti-intellectual, co-occur)
 - to avoid possible misreading (co-worker).
- **Principle 5:** When two or more modifiers (a word that tells us something more about another word) have a common base, this base is sometimes omitted in all except the last modifier. However,

the hyphens are retained (e.g., long- and short-term memory; 2-, 3-, and 10-minute trials).

2.5 Inclusive language

Refer Section 2.12 of the fifth edition of the APA manual; Section 3.10 of the sixth

IEA is committed to reducing bias in language. The APA statement on this matter applies equally well here.

As an organization, APA [read IEA] is committed both to science and to the fair treatment of individuals and groups, and this policy requires that authors who write for APA [IEA] publications avoid perpetuating demeaning attitudes and biased assumptions about people in their writing. Constructions that might imply bias against persons on the basis of gender, sexual orientation, racial or ethnic group, disability, or age are unacceptable.

(*Manual of the American Psychological Association*, 6th ed., 2010, pp. 70–71)

See also Section 3.12 “Gender-neutral language” in this present guide.

2.6 Some commonly confused word pairs

The list shown below relates to pairs of words that sound the same or almost the same. Other commonly confused words and phrases appear in the section on grammar in this guide (Section Three).

- **Aberrant/Abhorrent**

Both of these words are adjectives. *Aberrant* means abnormal, untypical, a departure from an accepted standard. *Abhorrent* means repugnant, nasty, repellent.

“Because you have always been an honest person, your stealing is an aberrant act, but I still find it abhorrent.”

- **Accept/Except**

Accept (verb) means to consent, take, receive, tolerate. *Except* (preposition) means other than, apart from, not including. *Except* can also act as a conjunction and as a verb. The verb form means exclusion from a group or category.

The club was pleased to accept the donation of money.

“I accept all you have told me.”

The dress was just what she wanted, except (*conjunction*) that it was too large.

She told me that I had nothing she wanted except (*preposition*) these old watches.

All media goods are subject to the new tax. Books, however, are excepted (*verb*).

- **Adduce/Deduce**

To *adduce* is to offer something as evidence or proof in support of an argument. *Deduce* means to reach a conclusion through reasoning or reference to evidence. Both words are verbs.

To support their argument that spring would be the best time to hold its fair, the village adduced information on weather patterns from the last three years.

We deduced from the lack of eggs over two weeks that our hens were now too old to lay eggs.

- **Afflict/Inflict**

The two words are verbs. *Afflict* means causing hardship or grief that has to be endured. *Inflict* means to impose something unpleasant on someone or something.

The whole island was afflicted by the cyclone.

This type of fish can inflict a painful bite.

- **All ready/Already**

The phrase *all ready* means everything is in readiness. *Already* is an adverb that means an action is complete by or before a stated or implied time.

Everything was all ready for the picnic.

He had already made the sandwiches.

- **All right/Alright**

All right, which can act as an adverb, adjective, or exclamation, is the acceptable formal usage. *Alright* is a colloquial use of all right, and is rarely used in formal writing.

"It's all right (*adverb*) I forgive you."

"The film was all right (*adjective*), I guess."

"All right (*exclamation*), I'll tell you what you want to know."

- **All together/Altogether**

The phrase *all together* means everyone is in or at the same place. *Altogether* is an adverb that means entirely, completely, "all told," or "on the whole."

We are all together at the party.

He is altogether mistaken in his belief.

The fruit pickers picked 10 boxes of apples altogether.

Altogether, the outcome is satisfactory.

- **Allusion/Illusion**

Allusion is the noun form of the verb “allude.” It means a “reference.” *Illusion* is a deceptive impression of reality.

Her allusion to the song was very appropriate.

The singing created an illusion of peace amidst the fighting.

- **Alternate/Alternative**

Alternate, which can act as a verb, adjective, or noun, means occurring in turns. *Alternative*, as a noun and an adjective, means doing something instead of something else; the emphasis is on choice.

The spectators’ mood alternated (*verb*) between joy and despair as they watched their team alternately (*adverb*) miss and score goals.

The alternate-day (*adjective*) diet requires people to eat normally one day, semi-fast the next, eat normally the next, semi-fast the next, and so on.

There is no alternative (*noun*) but to continue.

Many of the people in this area lead an alternative (*adjective*) lifestyle.

- **Alternately/Alternatively**

Alternately, an adverb, means in turns, one after the other.

Alternatively, also an adverb, means instead of, on the other hand.

The cat carried her kittens alternately to the bushes.

You can have a swim; alternatively, you can dance.

- **Amend/Emend**

Amend, a verb, means to change or correct something, whereas *emend*, also a verb, refers only to editing or correcting a text.

By emending the words of the first two paragraphs, the clerk amended the brief’s whole meaning.

- **Amoral/Immoral**

The adjective *amoral* refers to a state in which the concepts of right and wrong have no validity. An amoral person is therefore one who has no sense of or is indifferent to moral standards, principles, or rules. An *immoral* (adjective) person is one who understands right or wrong but still transgresses moral rules.

Amoral Nature cares not for who benefits from or is disadvantaged by her whims.

Many commentators view that period of history as a very immoral one.

- **Ante/Anti**

These are both prefixes (used in front of other words). *Ante* means before, as in antebellum (of or during the period before a war).

Anti means against, as in anti-smoking.

- **Appraise/Apprise**

Both of these words are verbs. If you *appraise* something, you are assessing its quality or value. If you *apprise* someone, you are making them aware of something.

The insurance company representative arrived promptly to appraise the damage to the house.

"I need to apprise you of the seriousness of the situation because no one else will."

- **Assure/Ensure/Insure**

These three words are all verbs. *Assure* means to promise or guarantee, *ensure* means to make certain, and *insure* is to buy insurance for something such as health or property.

Note: American spelling tends to use "insure" for both ensure and insure.

"I can assure you," said the agent, "that our company can insure you against all possible eventualities and thereby ensure/insure your peace of mind."

- **Biannual/Biennial**

Biannual refers to something that happens twice a year; *biennial* refers to something that happens every two years. Both words can act as a noun or an adjective.

The plant is a biennial (*noun*) because it takes two years to grow from seed, produce fruit and die.

The committee debated the merits of holding the art exhibition on a biannual (*adjective*) basis (twice a year) or a biennial (*adjective*) basis (every two years).

- **Cite/Site**

Cite is a verb that means to provide an example of, proof, or source for something said. *Site* is a noun that means the place or location of something.

Make sure you cite all sources of information in your research paper.

The site of the archeological dig could only be reached by helicopter.

- **Complement/Compliment**

To *complement* (verb) something is to make it complete or to add to it, usually in a pleasing way. To *compliment* (verb) someone is to praise them.

The shoes complement the outfit.

She received compliments on her shoes.

- **Continual/Continuous**

Continual means repeated or frequent. *Continuous* means without interruption. Both words are adjectives.

The boss reprimanded her for her continual absences from work.

We have followed the team continuously for five years.

- **Defuse/Diffuse**

Defuse, a verb, means to remove some sort of danger, while *diffuse*, also a verb, means to spread out, scatter.

We need to defuse this situation before someone gets hurt.

The coffee-bean roaster diffused the smell of coffee throughout the shopping center.

However, it is also acceptable to use *diffuse* in the sense of a lessening of danger. It is therefore similar to *defuse*, but the difference is that *defusing* removes danger or tension while *diffusing* it, lessens it.

By sitting down and talking over the situation, the neighbors began to diffuse the tension between them.

- **Dependant/Dependent**

Dependant is a noun. It refers to someone who depends on someone else for support, whereas *dependent* is an adjective that means supported, influenced, controlled, reliant on. UK-based writing uses these two forms as given. US English, however, uses “*dependent*” as both the noun and the adjective, although both versions can occasionally be found in formal US-based writing.

The census asked each “head of household” to list the number of dependants [the number of children] in the house.

That child is overly dependent on soft drinks to ease her thirst.

- **Disinterested/Uninterested**

Disinterested (an adverb) means impartial, that is, without bias.

Uninterested (also an adverb) simply means not interested in someone or something. However, US English generally finds it acceptable to use *disinterested* for both meanings.

The role of the judge is to act as a disinterested party in legal cases.

I was uninterested in the rugby game.

- **Effect/Affect**

Effect and *affect* can be both nouns and verbs. *Effect* as a noun means the result, outcome, or influence. *Effect* as a verb means to accomplish something or to make something happen. *Affect* as a noun is a clinical term used in psychology for an emotion or desire. *Affect* (verb) means to have an influence on something or somebody.

What effect (*noun*) will that have on the results?

The new traffic lights effected (*verb*) a reduction in peak-hour traffic congestion on the main road north.

The psychologist characterized the patient’s affect (*noun*) as “excitable.”

The weather affected (*verb*) our ability to harvest the grapes.

- **Farther/Further**

Farther is a comparative adverb that means at or to a greater distance or to a greater degree or extent. As a verb, *further* means to advance. As an adjective it means additional.

The young boy ran farther (*adverb*) than all the men.

We need to sit down now and talk in order to further (*verb*) the peace process.

Further (*adjective*) trials supported the original findings of the study.

- **Flaunt/Flout**

If you *flaunt*, you are showing off in some way. If you *flout*, you are disregarding or defying rules or moral codes. Both words are verbs.

She flouted the dress code when she flaunted her bright red jacket.

- **Formally/Formerly**

Formally and *formerly* are both adverbs. *Formally* is used in the sense of officially or properly, whereas *formerly* means at an earlier time.

Although I knew who she was, I had not been formally introduced to her.

Having formerly worked in public relations, he was ideal for the job.

- **Forward/Foreword**

Forward can be a verb, noun, adjective, and adverb, but all forms hold the meaning of moving toward or facing toward the front of a place. *Foreword*, a noun, is the name given to a short piece of writing that usually appears at the front a book or other text. It is typically written by someone other than the author of the book.

Everyone in the office was looking forward (*adverb*) to the end of year party.

The book's foreword was written by a distinguished scientist who had worked with the book's author.

- **Historic/Historical**

Historic means important or significant. *Historical* means pertaining to history. Both words act as adjectives.

Historical accounts tell us that Queen Elizabeth the First's address to her troops at Tilbury in 1588 was a historic (*adjective*) event.

- **Ingenious/Ingenuous**

Ingenious means clever, skilful, able to think and act in original ways. *Ingenuous*, also an adjective, means unsuspecting, innocent, unsophisticated.

The device looked strange, but turned out to be an ingenious means of holding tents secure in strong winds.

The young man's ingenuous nature made him easy prey for the two conmen.

- **Into/In to/Onto/On to**

Into is a preposition that indicates movement towards the inside of some place, while *in to* is an adverb (*in*, modifying a verb) and preposition (*to*). *Onto* (a preposition referring to a position on something) is acceptable usage in US English, but is still not fully accepted in formal UK English. *On to*, like *in to*, consists of an adverb (referring to position) and preposition (referring to movement). Even in US English, *on to* should not be written as one word when it means moving on towards somewhere else.

The man drove the car up the ramp and into the ship's hold.

It's good practice to plug your smartphone into its charger each night.

I refuse to give in to your demands.

The children clambered onto the trampoline.

Because it would not be dark for two hours, we decided to bike on to the next town.

- **It's/Its**

It's is the abbreviated form of "It is" or "It has" (pronoun plus verb). Here, the apostrophe shows elision (omission of one or more sounds in a word or phrase). The possessive form of the pronoun "it," *its* denotes belonging to or associated with a thing mentioned earlier or easily identified.

It's [it has] stopped raining.

Its [the cat's] fur was wet and dirty.

- **Imply/Infer**

To *imply* means to suggest or hint at something, without actually saying it. To *infer* means to "read between the lines" and draw a conclusion from the evidence. Both words are verbs.

The principal's speech implied that teaching hours would be cut.

The teachers inferred from the principal's speech that teaching hours would be cut.

- **Lead/led**

Lead can be a verb, noun, or adjective. As a verb it means to guide or begin, as a noun it is a substance, and as an adjective it means first. *Led* is the past tense of the verb *lead*.

The guide assured the tourists that she could safely lead (*verb*) them along the jungle track.

The lead (*noun*) in my pencil keeps breaking.

The lead (*adjective*) role went to the newest member of the acting troupe.

The captain led (*past tense of verb lead*) his team to success.

- **Loose/Lose**

Loose can be used as an adjective, an adverb or a verb. If something is *loose* (adjective), it is not tight; there is room to move. When used as an adverb, *loose* means without restraint. When used as a verb, it means to unleash, set free. If you *lose* (verb) something, you have lost it.

The dog is running *loose* (adverb) on the street.

He *loosed* (verb) the vicious dog on the street.

I'm scared this *loose* (adjective) ring will fall off my finger.

I'm scared I will *lose* (verb) my ring because it's too big for my finger.

- **May/Might**

May implies a real possibility of something occurring, whereas *might* implies a greater degree of uncertainty about whether something is likely to happen. Both words are modal (auxiliary, helping) verbs.

I *may* need to buy a new bathing suit if we decide we'll go to the beach during our trip.

You *might* get stopped by a road patrol if you keep driving over the speed limit.

- **Notable/Noticeable**

A *notable* person or thing is worthy of comment or distinction. A *noticeable* person or thing attracts attention, stands out in some way, or can be easily detected. *Notable* can act as an adjective or a noun; *noticeable* is an adjective.

Many *notable* (adjective) people gave presentations at the conference.

Many *notables* (noun) gave presentations at the conference.

The difference in sound quality between the two audio systems was very noticeable.

- **Percentage/Proportion**

Percentage refers to a share of 100. *Proportion* means a comparative part, share, or ratio of a larger whole. Both words are nouns.

A high proportion of the students—nearly two-thirds—said they enjoyed the course.

The percentage of people who said they “enjoyed the performance,” was much higher than the percentage of people who said they “did not enjoy the performance.”

- **Practicable/Practical**

Practicable (adjective) means possible, feasible, capable of being put into practice. *Practical*, also an adjective, means sensible, pragmatic, realistic, useful, capable of being put to good use. *Practicable* applies to plans or actions, not people, whereas *practical* applies only to people.

Your proposition appears to be a practical one but is actually not practicable.

- Prescribe/Proscribe**

Both of these words are verbs. *Prescribe* means to officially tell someone to do or use something, such as a therapy or medicine. *Proscribe* means to ban or forbid something.

The physiotherapist prescribed a range of exercises to strengthen my arm muscles.

Our country has just enacted a law proscribing nonuse of handheld mobile phones by people driving vehicles.
- Principal/Principle**

The word *principal* as a noun is the head of a school. As an adjective, it means most important or main. *Principle* (noun) is a standard, a rule, an underlying tenet, a code of behavior.

The principal (noun) of the school took the principal (adjective) role in directing the school play.

He believed in the principles of honesty and discipline.
- Provided/Providing**

Provided is the past participle of the verb provide. It is also a conjunction meaning “if”. *Providing* is the present participle of the verb provide. Providing is often used incorrectly as the conjunction.

Correct: You may go out this evening, provided you have cleaned your room.
- Quiet/Quite**

Quiet as a noun means silence. As an adjective it means restrained. As a verb, it means to make silent. *Quite*, which is an adverb, can be used in the sense of “to the utmost extent” or in the sense of “to a certain or fairly significant extent.”

The quiet (noun) of the valley surrounded us.

Her quiet (adjective) demeanor impressed us all.

Would you children quieten (verb) down!

Doing it this way is quite [absolutely] unnecessary.

It’s quite [fairly] a warm day out there.
- Stationary/Stationery**

Stationary can act as an adverb or adjective. It means not moving. *Stationery*, a noun, encompasses writing paper and related items.

The gymnasium has just installed six new stationary (adjective) bikes.

The train stood stationary (adverb) at the station.

At the beginning of each school year, students receive a stationery list setting out the writing materials they would need.

- **Tortuous/Torturous**

Tortuous (adjective) means curving, winding, usually in a deceptive or difficult way. *Torturous* (also an adjective) refers to causing great pain, torment, suffering.

The keynote speaker's tortuous address was a torturous experience for everyone listening to it.

- **Venal/Venial**

Venal, an adjective, means corrupt, easily bribed. *Venial*, also an adjective, means easily forgiven, usually in relation to a minor transgression or sin.

Venal customs officials agreed that, in return for money (a bribe), they would not examine several incoming boxes of goods.

The judge agreed that stealing a loaf of bread to feed a hungry family was a venial crime compared to embezzling funds intended for relief of the poor.

- **Who's/Whose**

Who's is a contraction of who (a pronoun) and is (a verb) and also of who and has, whereas *whose* is the possessive case of "who" used as an adjective.

Who's [who is] ready to get in the car?

Who's [who has] got clean hands?

Whose cup is this?

- **Your/You're**

Your is the possessive case of you used as an adjective. *You're* is a contraction of you (pronoun) and are (verb).

Is your bag the one with the red tag on it?

If you're happy with this arrangement, then I am too.

SECTION THREE

Grammar

**(some common conventions
and difficulties)**

This section presents several grammar-related conventions used in IEA publications. It also lists a few common grammatical errors and difficulties commonly seen in texts written for publication by IEA. To avoid lengthy explanations, we have not detailed the reasons for some of the preferred uses given here or cited all exceptions to some of these rules. If you need additional guidance and explanation, four excellent web-based grammar sites are:

- *The University of Chicago writing program*: <http://writing-program.uchicago.edu/resources/grammar.htm>
- *Grammarist*: <http://grammarist.com/>
- The OWL online writing lab: <http://owl.english.purdue.edu/>
- *Grammar Girl's QuickandDirtyTips.com*: <http://www.quickanddirtytips.com/grammar-girl>

3.1 Active/Passive voice

In sentences written in the active voice, the subject forms the action expressed in the verb, and the object of the sentence receives the action. The passive voice turns this construction around.

Active: The man (*subject*) climbed (*verb*) the mountain (*object*).

Passive: The mountain (*object*) was climbed (*verb*) by the man (*subject*).

Sentences written in the active voice are more direct and often less ambiguous than sentences written in the passive voice, and so make for clearer writing. Most authorities on good writing therefore advocate active over passive constructions. However, the passive voice has its place. For discussion on this matter, refer to the grammar websites above; see especially the “Active versus Passive Voice” and “Academic Writing” sections on the OWL site.

3.2 Agreement (subject/verb, noun/pronoun)

- The subject and the verb must agree in number: both must be singular, or both must be plural. The same rule applies to nouns and pronouns.

The school (*subject*) is (*verb*) large.

The schools (*subject*) are (*verb*) large.

The team members (*noun*) were late for the game. They (*pronoun*) were disqualified.

- Where the subject of the verb consists of more than one item, the verb is plural:

- Oregon, Illinois, and Florida (*subject*) are (*verb*) states in America.
- Collective nouns (“people,” “crowd”) are singular and so take a singular verb and a singular pronoun.
The team (*noun*) performed (*verb*) well. It (*pronoun*) looked good on the field.
 - Some words that are plural in form can be designated singular or plural, depending on sense or context.
Sense: Politics is evident in all facets of life. The politics of the issue are complex.
Context: The word “data” is treated as a singular noun in computer texts but a plural or collective noun in statistical texts.
 - When writing sentences in which parenthetical items appear between subject and verb, writers often erroneously use the plural form of the verb when it should be singular.
Amy, and also Jennifer, is (not are) to blame for what happened.
 - In instances where two or more people or objects form a collective entity, the singular form of the verb is used.
Fish and chips is our favorite takeaway meal.

3.3 Amount/Number

Use *amount* for quantity. Use *number* when it is possible to count the items involved.

I need a large amount of flour for the cakes. I also need a large number of eggs.

3.4 Among/Between

- The general rule is to use *between* when the reference is to only two people, ideas, or objects, and to use *among* if the reference is to three or more people, ideas, or objects. Thus:
We divided the cake between the two children.
We divided the food among the six groups.
The comparison was between the group who received the intervention and the group that did not.
The children could choose two items of fruit from among apples, pears, bananas, and peaches.
- However, it is acceptable to use *between* when the focus is on distinct, individual items, even if there are three or more of them. And it is acceptable to use *among* when the focus is on things that are not distinct, individual items.
Our choice was between raspberry, strawberry, and melon.
The differences in wool quality among the flock were negligible.

3.5 Because/Since

Because refers to causation; *since* implies time.

Since I gave up smoking, I have almost stopped coughing.

Because I gave up smoking, I have more money to spend on other things.

3.6 Can/May

Can means being physically or mentally able to do something. *May* means permission to do something.

Can you jump over the fence?

May I come to your house this evening?

3.7 Compared with/to

Use *compared to* when comparing people or things that have essentially different natures. Use *compared with* when comparing people or things that can be measured by a common standard.

My teenage daughter's bedroom can be compared to a disaster zone.

Compared with urban students, rural students have more fun.

3.8 Different from/than/to

It is always correct to use *different from*, although American English recognizes *different than*, while *different to* is more commonly used in UK English. Because the adjective “different” is used to draw a distinction (in the sense of away from, separate from, distinct from), adding the preposition “from” makes sense in most instances.

3.9 Each other/One another

Use *each other* in reference to two people. Use *one another* when three or more people are involved.

The two children played happily with each other.

The five classmates talked to one another.

3.10 Either/or and Neither/nor

Either/or and *neither/nor* are correlative conjunctions. *Either* is always paired with *or*. *Neither* is always paired with *nor*. Note that these correlative conjunctions take the singular form of the verb.

Either you or I should go.

Neither the butcher nor the baker was open.

3.11 He/Him, She/Her, They/Them

He, she, and they are subject pronouns. *Him, her, and them* are object pronouns. They therefore need to be used as such in sentences.

Incorrect: Her and I went to the shop.

Correct: She and I went to the shop.

Incorrect: I never know what to say to my sisters and he when they get angry with me.

Correct: I never know what to say to my sisters and him when they get angry with me.

Incorrect: It is them who are responsible for the damage.

Correct: It is they who are responsible for the damage.

3.12 Incomplete comparisons

Writers sometimes fail, when claiming that something can or should be compared to something else, to state what that something else is.

Incorrect: My paper on this topic is shorter, more erudite, and more useful.

Correct: My paper on this topic is shorter, more erudite, and more useful than my colleague's paper on the same topic.

3.13 Fewer/Less

Use *fewer* for items you can count. Use *less* for quantity.

The program has resulted in fewer students failing their examinations.

The teachers took less time to administer the new test than they took to administer the previous test.

3.14 Gender-neutral language

- **He/She/They**

If the situation involves only males or only females, use *his* or *her* as appropriate.

Every boy must go fishing at least once in his life.

Every girl wrote her name in the book.

If the situation involves males and females, use *his* or *her* or *they* to ensure gender neutrality.

Each student had his or her book open at page 16.

The students had their books open at page 16.

As much as possible, though, use plural nouns and pronouns in sentences to avoid awkward “he or she” constructions in situations involving both males and females.

It is up to students to decide when to do their homework.

instead of

It is up to the student to decide when to do his or her homework.

However, a singular noun with a plural pronoun is acceptable usage, but only if it does not compromise euphony and clarity. Nobody (*singular*) has taken their (*plural*) lunch outdoors.

- **Occupations**

Within the bounds of common sense, use gender-neutral terms for the names of vocations and positions of responsibility, for example, businessperson, chairperson (or chair), fire officer, humankind, salesperson, waiter (*not* waitress).

3.15 Me/Myself/I

These words are pronouns. A pronoun is a word that stands in place of a noun, but people often have trouble using these three pronouns correctly. Knowing when to use *me*, *myself*, or *I* relies on being able to differentiate between the subject and object in a clause or sentence (refer to Item 3.1 above). *Me* always acts as the object. *I* always acts as the subject. Only use *myself* when you have referred to yourself earlier in the sentence.

Incorrect: Me enjoyed the party.

Correct: I enjoyed the party.

Therefore:

Incorrect: My friends and me enjoyed the party.

Correct: My friends and I enjoyed the party.

Incorrect: I won't let me eat cake until I've lost five kilos.

Correct: I won't let myself eat cake until I've lost five kilos.

3.16 Misplaced modifiers

Modifiers are words or groups of words that tell us something more about other words or groups of words. Two common difficulties with modifiers follow.

- **Dangling participle (or modifier)**

Verbs ending in *ing* are participles. A dangling modifier makes for an unintended and often humorous sense in a sentence, as in, “While baking the buns, the clock chimed the hour.” Presumably, it is not the clock that is doing the baking, but the baker. The point here is that the subject of the verb must be explicit: “While the baker (*subject*) was baking the buns, the clock chimed the hour.”

- **Misplaced word or phrase**

When using a single word as a modifier, writers must make sure that its placement relates clearly to the word/s they want it to modify. The words *only* and *nearly* provide typical examples.

Consider the difference in the sense of these sentences:

We nearly lost all our possessions in the fire.

We lost nearly all our possessions in the fire.

She sings operatic arias on Saturdays only.

She sings only operatic arias on Saturdays.

The same principle applies to phrases. Consider these sentences containing the phrase “with a laugh.”

She suggested what I should do with a laugh.

She suggested, with a laugh, what I should do.

3.17 Not only/But also

Here, the arrangement of words that follows the first of these paired conjunctions (i.e., *not only*) must parallel the second (*but also*).

Incorrect: The new day brought not only sunshine, but it also brought strong winds.

Correct: The new day brought not only sunshine but also strong winds.

3.18 Preposition (ending sentence with)

Prepositions are words, mostly short ones, which show how words relate to one another (e.g., *for*, *by*, *up*, *under*). Some grammarians still claim that a sentence should never end with a preposition, but this rule can result in very awkward, pedantic sentences. It is therefore acceptable to place prepositions at the end of sentences whenever euphony and common sense indicate that this is the best choice.

3.19 Unclear or faulty pronoun referent

Make sure that the referents of pronouns (i.e., the nouns to which the pronouns refer) are clear.

Unclear: Take the bread out of the packet and put it (*pronoun*) on the plate.

Clear: Take the bread out of the packet and put the bread [*not the packet*] on the plate.

Unclear: It (*pronoun*) says in the book that dairy farms pollute waterways.

Clear: The book says that dairy farms pollute airways.

Clearer: According to the book, dairy farms pollute airways.

Unclear: Jeffrey and Jim are always arguing, but he (*pronoun*) says it (*pronoun*) is always in jest.

Clear: Jeffrey and Jim are always arguing, but Jim says the arguing is always in jest.

3.20 Redundancy

A redundancy is a word or phrase that unnecessarily repeats what already is written, sometimes to the point of absurdity.

We campaigned vigorously for freedom and liberty. [Use either freedom or liberty, not both.]

3.21 Split infinitive

The infinitive is the *to* form of the verb (e.g., to run, to jump, to be). Splitting the infinitive refers to placing a word, usually an adverb, between *to* and the verb, as in “to quickly go.” Many people would immediately amend this to read, “to go quickly.” However, the rationale for condemning the construction is based on a false analogy with Latin language usage. If splitting the infinitive makes for the clearest mode of expression, it is acceptable. Be wary, though, of inserting more than one word between the *to* and the verb, as this can make for an awkward, ill-sounding construction.

3.22 That/This (as vague referents)

Writers often do not make clear what each of these two demonstrative pronouns (i.e., *that* and *this*) refers to (the “what” being the pronoun’s referent or antecedent). Failing to provide the referent of these pronouns can make for vague or ambiguous meanings.

There is much concern about the growth in dairy farms in our province. This [*pronoun*] is because these farms are known to pollute waterways.

There is much concern about the increasing number of dairy farms in our province. This concern [*concern being the antecedent or referent of this*] has arisen because these farms are known to pollute waterways.

3.23 That/Which/Who

These words are relative pronouns because they introduce relative clauses. Relative clauses are dependent clauses that modify (tell us more) about a word, phrase, or idea in the sentence’s main clause. In modern speech, *that* normally refers to things but can refer to a class or type of person. *Which* refers to things; *who* refers only to people.

Today, *that* is often used in a restrictive sense and *which* in a nonrestrictive sense. The restrictive sense signals information that is essential to identifying a noun or the meaning of the sentence. The nonrestrictive sense presents information that is not essential to identifying a noun or the meaning of the sentence. The first example below identifies a particular fox. The second example simply provides extra information about the fox. Note that with the nonrestrictive use, a comma comes before *which*.

Restrictive: This is the fox that caught the chickens.

Nonrestrictive: The fox, which caught the chickens, is in the wood.

3.24 Who/Whom

Who, along with *he*, *she*, *it*, *we*, and *they*, is a subjective pronoun, which means it is used when the pronoun acts as the subject of a clause. *Whom*, along with *him*, *her*, *it*, *us*, and *them*, is an objective pronoun, which means it is used when the pronoun acts as the object of a clause. If in doubt, substitute *who* with the subjective pronouns *he* or *she* and *whom* with the objective pronouns *him* and *her*. Euphony will quickly tell you whether *who* or *whom* is correct.

Who do you think committed the crime? [He or she committed the crime, not him or her.]

The eminent professor whom I met [*I met him*] at last year's conference was very inspiring. [*I met him or her, not I met he or she.*]

**SECTION
FOUR**

Punctuation

For general and additional guidance on punctuation, see one of the grammar websites listed under Grammar (Section Two) of this guide or refer to Chapter 3 of the fifth edition of the APA manual and Chapter 4 of the sixth.

4.1 Apostrophe

The apostrophe has several purposes, but the two main ones are:

(i) To show possession in nouns

Add an apostrophe and the letter “s” after all singular nouns and after plural nouns that do not end in “s”:

The girl’s cat

The children’s books

The women’s room

Add an apostrophe but do not add “s” after plural nouns ending in “s.”

The boys’ boat

The Browns’ holiday home

(ii) To form contractions of words

“Cannot” to “can’t”

“They are” to “they’re”

“It is” to “it’s”

Note:

- The possessive pronouns (“his,” “hers,” its,” “ours,” “yours,” “theirs,” and “whose”) never take an apostrophe. One of the most common errors in this regard is confusing the possessive pronoun “its” with the contraction “it’s” (for “it is”).
- Do not use apostrophes for proper nouns that are used adjectivally (in relation to a noun):
 - Keller plan
 - Tyler evaluation model
 - Penguin books
 - Tinbergen model
- Do not use the apostrophe for the plural of abbreviations:
 - MPs, 1990s

4.2 Brackets and parentheses

- **Order**

Use **brackets** [] to enclose parenthetical material that is already within **parentheses** ():

(The results for the mature-age students [$n = 20$] are given in Table 2.)

However, do not use brackets if the material can easily be offset with commas:

(as the study by Cassidy, 2006, established)

Braces { } can also be used if further offsetting is needed.

The full scheme is ([{ }]).

Use brackets for editorial interpolations in text that is taken from another person's writing.

"The work she had done analyzing the results throughout that long summer had all come to nothing [or so she thought at the time] and was one of the reasons for the events that followed" (Hames, 1998, p. 54).

- **Punctuation with ...**

A period (full point) should come before the closing parenthesis if the whole sentence is in parentheses; otherwise, it should come after the closing parenthesis. Commas should occur after the closing parenthesis.

Forelli insisted on rewriting the paragraph. (I had encountered this intransigence on another occasion.)

The driver glanced in his rear-view mirror to observe the passenger (the one in the derby hat).

Here he gives a belated, though stilted (and somewhat obscure), exposition of the subject.

Although she rejected his first proposal (she could not have done otherwise without compromising her basic position), she made it clear she was open to further negotiations.

Colons and semicolons always appear after parentheses.

4.3 Colon

Use a colon:

- **To introduce a series of items.**

Your child will need to bring these items to the school picnic: packed lunch, bottle of water, sunhat, sunscreen lotion, and a small mat to sit on.

- **Between an introductory clause that is grammatically complete (could stand as a sentence) and a final phrase or clause that builds on or extends the preceding thought:**

I had two tasks to complete before the end of the day: a tidy-up of my office and returning the journals to the library.

- **In ratios and proportions:**
The ratio of solid to liquid was 1:3.

4.4 Comma

- **In lists**

In a list of items or in a series of phrases of which the last is introduced by “and” or “or,” use a comma before the “and” or “or.” This use of the comma is known variously as the serial, list, and Oxford comma.

The sample included students from Year 1, Year 2, and Year 3 classes.

Many of the schools found it difficult to find money for new computer equipment, to meet their staff’s requirements for professional development in ICT, and to consult widely with their communities about which technology to bring into the school.

- **With abbreviations**

Follow the abbreviations “e.g.” and “i.e.” with a comma. If the abbreviation is set parenthetically within a pair of commas, spell out the abbreviation: “to go, for example, from A to B”.

4.5 Ellipses

To show missing words in quoted text, use three equally spaced full points. If the omission follows a complete sentence, use the normal period at the end of the sentence, followed by three equally spaced periods.

“In time, we consider it will be possible to reach consensus. ... However, what we will need to do in the meantime is ... remain steadfast.”

Use three equally spaced periods to indicate a “trailing away.”

“I don’t really know, but ...”

4.6 Period (full point)

Use a period to end a full sentence. For other uses of periods, see Sections 4.8, 5.1, 5.4, 5.7, 5.11, and 6 of this guide.

4.7 Hyphen, en dash, and em dash

Use these as follows.

- **Hyphen**

The **hyphen** (-) connects words or parts of words in various ways to make compound words.

the policy-making process, re-enter, school break-up, long- and short-term memory, 16-year-olds, director-general, self-esteem, decision-maker

Do not make compounds involving adverbs:

Correct: Mason Street is badly lit.

Correct: This story is well known.

Note: For more guidance on hyphenated words, see Section 2.4 above and Appendix 2.

- **En dash**

The **en dash** (–) is approximately twice as long as the hyphen. The en dash has the sense of “to” or “and” when used to connect words and numbers.

The Paris–Moscow train

For examples, see pages 16–20.

During the period 1990–2000

Use it also for page numbers cited in bibliographic references.

... *Journal of Behavioral Science*, 3(4), 31–55.

- **Em dash**

The **em dash** (—), which is twice as long as the en dash, abuts the words on either side of it (i.e., no space before and no space after the words). It typically indicates a sudden interruption in the flow of a sentence or a parenthetical statement. Use it sparingly.

I was minding my own business—or not, as my neighbor would say!

I was hanging out the washing—late in the day it was—when a stranger entered my garden.

4.8 Quotation marks

- Use double quotation marks always, except for quotations within quotations, where you should use single quotation marks (this is their only legitimate use).

- In conventional American order of punctuation, commas and periods are set before adjacent closing quotation marks, even if only one word has quote marks around it.

The board member replied, “There is no reason to doubt the president’s statement.”

I have just read, “A Good Man Is Hard to Find.”

We asked them to sing “Somewhere over the Rainbow.”

See immediately below Brighton’s comments on “political expedience,” which I discuss further in Chapter 10 of this book.

She asked him to explain what he meant by “normal.”

- Place other punctuation (e.g., colon, semicolon) outside the quotation marks unless it is part of the quoted material.

4.9 Semicolon

Use a semicolon to:

- Separate two independent clauses that are not joined by a conjunction:
The time was right; it was definitely right.
- Separate items in a series that already has commas:
We bought apples, pears, and bananas; potatoes, beans, cabbage, and carrots; and meat, milk, and cheese.

4.10 Slash (also called a virgule, solidus, shall)

Use a slash to:

- Clarify a relationship:
The 2005/2006 financial year
- Separate numerator from denominator:
X/Y
- To indicate “per” in units of measurement accompanied by numerals:
8.6mg/kg

4.11 Punctuation in abbreviations

See Section 4.4 above and Section 5.1 “Abbreviations” below.

4.12 Punctuation in equations

As a general policy in scientific copy, it is better to over-punctuate than to risk leaving the reader in any doubt as to the sense of a passage. This practice applies particularly to texts with a high density of formulas. All equations should belong in some sense or other to a sentence in the text, and you should punctuate the sentence accordingly, and correctly. For aesthetic reasons, however, the equation itself does not need to be end-punctuated.

The quantity x can then be expressed as a function of y ,

$$x = f(y)$$

4.13 Punctuation in relation to quotation marks

See Section 4.8 above.

**SECTION
FIVE**

Other Elements

Again, this section provides some general principles only. For detailed guidance, refer to the sections of the APA manual stated in association with each element.

5.1 Abbreviations

Refer to Sections 3.20 to 3.29 of the fifth edition of the APA manual and Sections 4.22 to 4.30 of the sixth

- **General**

Abbreviations encompass Latin terms (i.e. and e.g.), the names of organizations (IEA for International Association for the Evaluation of Educational Achievement), specialist terminology (STM for short-term-memory), and acronyms (DNA for deoxyribonucleic acid).

In SI (International System of Units) metric parlance, “km” and other units are not abbreviations; they are symbols. Hence, unlike imperial units such as “yd.” or “sec.,” they do not end in periods and do not have a plural form (10 km but 10 ins). Note also that metric symbols for units should be used only with numerals.

Incorrect: 10 kilometers

Correct: 10 km or ten kilometers

- For clarity, use abbreviations sparingly.
- Use common sense to decide if you need to spell out (write out) abbreviations so that readers know what words they represent. In general, do not spell out abbreviations in common usage, such as a.m., p.m., but do spell out those that may be unfamiliar to readers. Appendix 3 provides a list of preferred abbreviations. The list indicates which abbreviations do not need spelling out on first occurrence, and those that generally should be spelled out on first occurrence.
- Write the full form for an organization or for specialist terminology if the expression is used only once or infrequently in the text.
- Write out “for example” and “that is” when using these terms outside parentheses; use e.g. and i.e. when inside.
- Do not abbreviate cross-references to other parts of your text or another publication (e.g., Vol., Chap., Fig.) if they appear at the beginning of a sentence.
- As a general principle, omit periods (full stops) in abbreviations that consist of capital initials, for example, OECD, and in abbreviations for honorifics (Mr, Mrs, Ms, Dr). Use them, however, for the initials of people’s first names, Latin abbreviations, and abbreviations used in bibliographic references.

- **Abbreviations for IEA studies**

Civic Education Study	CivEd
Computers in Education Study	COMPED
Early Childhood Education Study	ECES
English Teaching and Learning Study	ETLS
First International Mathematics Study	FIMS
First International Science Study	FISS
International Civic and Citizenship Education Study 2009	ICCS 2009
International Civic and Citizenship Education Study 2016	ICCS 2016
International Civic and Citizenship Education Study 2018	ICCS 2018
International Reading Literacy Study	IRLS
International Computer and Information Literacy Study 2013	ICILS 2013
Preprimary Project	PPP
Progress in International Reading Literacy Studies	PIRLS
Progress in International Reading Literacy Study 2001	PIRLS 2001
Progress in International Reading Literacy Study 2006	PIRLS 2006
Progress in International Reading Literacy Study 2011	PIRLS 2011
Progress in International Reading Literacy Study 2016	PIRLS Literacy 2016
Progress in International Reading Literacy Study: for Grade 5 or 6	prePIRLS 2011
Progress in International Reading Literacy Study: Reading Assessment for an Online World	ePIRLS 2016
Second Information Technology in Education Study 2006	SITES 2006
Second Information Technology in Education Study Module 1	SITES–M1
Second Information Technology in Education Study Module 2	SITES–M2
Second International Mathematics Study	SIMS
Second International Science Study	SISS
Teacher Education and Development Study	TEDS
Teacher Education and Development Study in Mathematics	TEDS–M
Third International Mathematics and Science Study	TIMSS 1995
Third International Mathematics and Science Study Repeat	TIMSS 1999
Third International Mathematics and Science Study Repeat: TIMSS 1999 Video Study	TIMSS 1999 Video Study
Trends in International Mathematics and Science Studies	TIMSS
Trends in International Mathematics and Science Study 2003	TIMSS 2003
Trends in International Mathematics and Science Study 2007	TIMSS 2007
Trends in International Mathematics and Science Study 2015	TIMSS 2015
Trends in International Mathematics and Science Study Advanced 2015	TIMSS Advanced 2015
Trends in International Mathematics and Science Study Numeracy 2015	TIMSS Numeracy 2015

5.2 Capitalization

Refer Section 3.12 of the fifth edition of the APA manual and Sections 4.14 to 4.20 of the sixth

In general, avoid overuse of initial capital letters.

Capitalize the initial letters of:

- Word beginning a sentence.
- Proper nouns (names of people, peoples, cities, etc.): Barbara, Romanians, Beijing.
- Geographical names, but only if they are part of the title of an area or a political division and are not descriptions in general terms: South West Africa, Western Australia, the West (but southern Scotland, the south of Scotland).
- The names of periods (e.g., Carboniferous, Iron Age, Dark Ages, The Great Depression) and wars (use First World War and Second World instead of WWI, World War II).
- Major words (i.e., not conjunctions, articles, and short prepositions) in the titles of books, articles, periodicals, television programs, and the like when these titles are cited in the main body of the text:

Publication Manual of the American Psychological Association

Home and Away

- Proper nouns in the titles of books and articles listed in reference lists and bibliographies:
Fraser, G. G. (2005). *King Henry VIII and his six wives*. London, UK: Sterling Publications.
 - Major words in the titles of periodicals (e.g., academic journals) in reference lists and bibliographies:
Smyth, A. E. (2003). Wet days, fun games. *Journal of Playtime*, 3(4), 22–44.
- Note:** for more information on the use of capitals in reference list/bibliography citations, see Section 6 of this guide.
- Proper nouns and also adjectives and nouns used as proper nouns:
Murphy's Law
Ionic column
 - Names of departments, organizations, political parties, institutions, religious denominations, and other bodies when given in full:
the Department of Engineering, Adamson University (*but* the department, the university)
the Reston Board of Trustees (*but* the board)
the Government of Fiji (*but* the government)
the Roman Catholic Church (*but* the church)

- Names of academic courses and programs when given in full:
Sociology 101
Fresh Start Program
- Trade and brand names of drugs, equipment, and food:
Vodafone
Durasteel
Heinz
- Nouns followed by numerals or letters that denote a specific place in a numbered series:
On Day 2 of Experiment 4...
During Trial 5, Group B performed...
As seen in Table 2 and Figure 6 in Section 2.6 of the manual.
- Exact, complete test titles as published:
The Advanced Vocabulary Test
Minnesota Multiphasic Personality Inventory
Stroop Color–Word Interference Test
- Names of factors, variables, and effects (note that factor is not capitalized unless it is followed by a number):
the Activity factor (Factor 6)
- Titles and ranks only when they accompany a personal name:
King John, *but* “the king decreed ...”
Prime Minister Helen Clark, *but* “The prime minister said ...”

Do *not* capitalize the initial letters of:

- Proper adjectives that have gained a common meaning:
cesarean section
- Names of laws, theories, models, and hypotheses:
law of relativity
age–stage hypothesis
- Names of effects in an analysis of variance:
a significant age effect
main effect of serial position
- Names of conditions or groups in an experiment:
experimental and control groups
subjects were divided into information and no-information conditions
- Nouns that precede a variable:
trial n item x
- Laws, theories, and hypotheses, even if accompanied by the name of their developer:
Gregory’s theory of illusions
the empirical law of effect

- Shortened or inexact titles of tests or titles of unpublished tests, even if accompanied by the name of their developer:
a vocabulary test
Stroop color test
- Words such as “test” or “scale” if they refer to subscales of tests.

Two other points:

- Capitalize to avoid ambiguity. For example, the word “state” in the political/government sense (i.e., the State) may need to have a capital “S” to avoid confusion with other meanings of the word “state.” Similar examples are Radical/radical, Liberal/liberal. “Parliament” is often lower case (“parliament”), but “Commons,” “Lords,” and “House” are capitalized.
- Use small caps for abbreviations relating to time periods, notably BC and AD.

5.3 Footnotes and endnotes

Refer Section 5.20 of the fifth edition of the APA manual and Section 2.12 of the sixth

- Avoid footnotes to the main text as much as possible by endeavoring to work them into the text.
- Where you cannot do this, indicate them in the text by superior arabic numerals and, wherever possible, place them at the end of a sentence or phrase. Footnote indicators follow all marks of punctuation except a dash:
... using Thompson and Albert’s version of this machine,¹
Three of the five groups—Intervention A, Intervention B, and Intervention D¹—did not perform as hypothesized.
- Depending on the nature and extent of the notes, they can be set as footnotes at the bottom of the page or as endnotes in a block at the end of a journal article or a chapter in a book. Another alternative is to set all the notes as endnotes at the end of the book in one block, and to have the notes for each chapter appear under the heading for that chapter.
- With the end of chapter and end of book options, set the notes under the heading “Notes.”
 - If you are placing the notes at the end of each book chapter, place them before the reference list or bibliography
 - If you are setting the notes for all chapters at the end of the book, place them after the last chapter.
 - If there is a reference list or bibliography for the whole book, place the notes before these lists.

- If you are placing the notes at the end of a book that has appendices, place the notes after the appendices.
- Set footnotes and endnotes in a point size smaller than that used in the main body of the text.
- Please note that some IEA publications prohibit endnotes. When this is the case, all footnotes must be numbered per chapter and placed at the bottom of the page, not the end of the chapter.
- Remember that footnotes and endnotes provide additional information and should never include figures or tables.

5.4 Headings

Refer Section 5.10 of the fifth edition of the APA manual and Sections 3.2 and 3.3 of the sixth

- Try not to use too many levels of headings, as these can give a piecemeal look to your text and produce typographical difficulties. Within this limitation, use as many headings as are needed to structure your text sensibly and point the way for readers. A general recommendation is to employ no more than five levels, with three being the preferred number.
- Please note that some IEA publications require use of no more than five levels of heading within a text and ask that the first two or three heading levels be numbered.
- Denote each level typographically, either using the conventions given in the APA manual or one of your own devising. If the gradation is of your own devising, make sure each level is clearly differentiated. For example:
 - **HEADING ONE**
(all caps, bold type, 16 point Times New Roman)
 - **Heading Two**
(capital letter for initial letter of each word, except for articles [the, a] and small prepositions, bold type, 14 point Times New Roman)
 - *Heading Three*
(capital letter for initial letter of each word, except for articles and small prepositions, bold italic type, 12 point Times New Roman)
 - *Heading Four*
(capital letter for initial letter of each word, except for articles and small prepositions, italic type, 12 point Times New Roman)
 - *Heading five*
(capital letter for the first letter of the first word and lower case for the initial letter of subsequent words unless those words are proper nouns, 11 point Times New Roman)

- Alternatively, set each heading in the same font, and then beside each, in square brackets, denote its order by having [H1], [H2], [H3], and so on. Ensure, however, that these notations are deleted before the text is typeset ready for printing or e-production.
- Ensure that your headings always keep to the hierarchical sequence.
- Use commas, colons, and semicolons in headings as appropriate, with a space after each item of punctuation. Do not use periods at the ends of headings.

5.5 Italics

Refer Section 3.19 of the fifth edition of the APA manual and Section 4.21 of the sixth

Use italics for:

- Titles of books, periodicals, newspapers, and magazines cited in the main body of the text and in reference lists and bibliographies:
My favorite book is *The Shipping News* by E. Annie Proulx.
- Genera, species, and varieties:
Ratus ratus
- To introduce a new, technical, or key term (but do not italicize the word or phrase after its first use):
The *longevity effect* is particularly evident among the inhabitants of this island.
- Letters used as statistical symbols or algebraic variables:
t test, *SEM*
- Words in foreign languages (except the names of persons and places), but not if they are in common use in English.
- Emphasis, but do so sparingly.

Do not use italics for:

- Titles of articles in newspapers and magazines, chapters and sections of books, book series, unpublished theses and papers, conference papers, and lectures *when cited in the main body of the text* (enclose them in double quotation marks instead).
Note: The use of italics for the titles of chapters, periodicals, and other sources in references lists and bibliographies is not always straightforward. Refer to Section 6 “Reference Lists and Bibliographies” of this guide.
- Chemical terms (H₂O), trigonometric terms (tan, log), nonstatistical subscripts to statistical symbols or mathematical expressions (F_{max}), and Greek letters (II).

- Common abbreviations such as e.g., et al., i.e., ibid.
- Latin phrases in a medical context, such as “in vivo” and “in vitro,” that have become standard usage in English.

Note:

Use quotation marks, not italics, when a standard technical term is used in a sense other than in its normal one:

The “free” electron cannot in fact escape beyond a couple of atomic radii.

The use of italics in statistical and mathematical texts is not straightforward. See Section 5.10 below.

5.6 Numbers

Refer Sections 3.42 to 3.49 of the fifth edition of the APA manual and Sections 4.31 to 4.38 of the sixth

Numbers expressed in words

Some numbers are expressed in words according to general use and the need for typographic solidity. *Use words* to express:

- *The numbers zero through nine*
A total of five lists of 32 words each were presented to the children.
The subjects were six undergraduates.
The cage contained two levers.

Note: For exceptions to this rule, see “Numbers expressed in figures” below.

- *Any number that begins a sentence:*
Sixty-four items were on the list.
One hundred undergraduates served as subjects.
Six percent of the total responses were errors.

Note: If possible, rewrite a sentence to avoid starting it with a number.

Numbers expressed in numerals

Numbers of two or more digits and numbers in technical, scientific, and statistical matter are easier to comprehend when expressed in numerals. Use the following guidelines to determine appropriate forms for numbers. Use numerals to express:

- Number 10 or greater: a total of 64 lists
- Any numbers above or below 10 that are units of measurement or time, abbreviated or not: were given 5-mg drug pellets daily for 3 days
- Times and dates: 8:30 a.m. on May 6, 1912
- Percentages: a total of 6 percent

- **Arithmetical manipulation:** multiplied by 3
- **Ratios:** 4:1
- **Fractional or decimal quantities:** a 2 ½-year-old; 2.54 cm
- **Exact sums of money:** were paid \$5 each
- **Scores and points on a scale:** was 4 on a 7-point scale
- **Actual numerals:** the numerals 1–6
- **Page numbers:** on Page 2
- **Series of four or more:** 1, 3, 5, and 7
- **Numbers grouped for comparison:** Of the 40 trials, 6 were ...
- **Within a sentence or a series of related sentences if any one of the numbers is 10 or more (let clarity be the guide in applying this rule):**
 Included in the 14-pair list were 7 nouns, each occurring in 2 pairs, and 14 adjectives, each occurring in 1 pair.
 The group consisted of 9- to 12-year-olds.

Note: If figures and words appear together, try recasting the sentence: “The group had 48 men and 38 women” is better than “Forty-eight men and 38 women were in the group.”

Ordinal numbers

- Treat ordinal numbers as you would cardinal numbers: the fifth list for the first-grade students; the 75th trial (or Trial 75)
- However, present percentiles and quartiles as figures: 5th percentile; 1st quartile
- Always use words for specifying centuries: nineteenth century.

Arabic or roman numerals

- Because roman numerals are cumbersome and difficult to read, use arabic numerals wherever possible: Experiment 1; Group 3; Vol. 3
- However, if roman numerals are part of an established terminology, do not change to arabic numerals: Type II error; Factor I

Commas in numbers

- In most numbers above 9999, use commas between every group of three digits in text and in tables: 11,536 items; 34,587 pellets
- Exceptions to this rule are page numbers, binary digits, serial numbers, degrees of temperature, acoustic frequency designations, degrees of freedom, and numbers to the right of a decimal point.

Decimal fractions

- Use a zero before the decimal point in decimal numbers that are less than 1 when the value can exceed 1.0 (e.g., the mean was 0.95). However, when the value can never exceed 1.0, omit the leading zero, as a visual indicator of restricted range (e.g., $p < .01$).
- Use decimal fractions instead of mixed fractions (6.25, not $6\frac{1}{4}$) unless mixed fractions are more appropriate (e.g., a $3\frac{1}{2}$ -year-old).

Dates

- Change terms such as 90s, 90's or nineteen-nineties to 1990s. Delete time-related expressions such as “recently,” “currently,” “still,” and “hitherto,” or substitute absolute time indicators, such as “in the early 1980s.”
- In text, write “from 1950 to 1966” rather than “from 1950–66.” However, if you write the date in parentheses, the form (1950–66) is acceptable.

5.7 Units of measurement

Refer Sections 3.50 to 3.51 of the fifth edition of the APA manual and Sections 4.39 to 4.40 of the sixth

IEA uses the metric system in its publications.

- As much as possible, express all references to physical measurements in metric units.
- In instances where the instruments used recorded measurement in nonmetric form, give the nonmetric form followed by the metric equivalent in parentheses.
- Use the abbreviation or symbol for a measurement when it appears with a numerical value (e.g., 10 m), but spell the unit out when it does not (e.g., “covered ten meters”).
- Use lowercase letters when writing out the full names of units, unless the name is in material typeset in capitals or at the beginning of a sentence.
- Do not use a period after a symbol, except at the end of a sentence.
- Do not make symbols of units plural.

5.8 Series and lists

Refer Sections 3.33 and 5.12 of the fifth edition of the APA manual and Section 3.4 of the sixth

- To show seriation within a sentence or paragraph, use lower case letters (roman font) in parentheses:
The children were administered (a) the test without the illustrative material, (b) the test with the illustrative material, and (c) a booklet of blank pages on which they drew their pictures.
- To show successive steps in a procedure, to list instructions, to set out conclusions, or to emphasize points, use numbers, lower case or upper case letters, or bullets to suit. Try not to overly “mix and match” these devices. Numbers are best for steps in a procedure, letters of the alphabet for conclusions, and bullets for emphasized points. You can use any of these devices for instructions, with your choice dependent on context and on placement within the text (e.g., small letters if instructions are given with a sentence; bullets if they follow a “stem statement”).
- When setting out serried items leading from a stem statement, make sure the beginning of each item ties in grammatically with that statement. Thus:
When preparing text for publication:
 - Double space the text
 - Provide all tables and figures in separate files
 - Put your name and the page number on each page.

5.9 Source material (citing other people’s text and illustrations)

Refer Sections 3.34 to 3.41 of the fifth edition of the APA manual and Sections 6.1 to 6.10 in the sixth

Citing the source

- When using the work (whether textual or illustrative) of other people, you must credit the source:
Constable and Millot (2000, p. 36) claim that “with the rapid increase in new, user-friendly technologies, the paperless classroom will soon be with us.”
- Pay careful attention to copyright law when making direct use of someone else’s text (whether prose, poetry, play, film script), illustrative material, or musical scores or lyrics. While permissible to use material under the auspices of “fair use,” the boundaries of what constitutes such use vary in accordance with the type of work (e.g., plain text, musical score, lines of poetry) and across

jurisdictions. Ensure you are operating within these boundaries. If you are not, you must obtain written permission from copyright owners to use their material, and pay permission fees if necessary.

- If copyright owners require a permission note to be included with their written material as it appears in the text, set it down as a footnote in your text and use the exact wording provided by the owner. If the material is a table or figure, place the credit at the bottom of the table or figure and preface it with the word “Source” followed by a colon: Source: Bryan and Phillips (2003), p. 10.

Styling quoted text

- Set text that you quote from other sources and that contains up to approximately 50 words in length into the main body of the text. Offset the quoted text with double quotation marks (see example under first bullet above).
- Set text of 50 words or more as a block of text indented in from the left margin. Do not use quotation marks. If the quoted text covers more than one paragraph, slightly indent subsequent paragraphs in from the first line of the first paragraph.

Paulson (2004, p. 85) recounts the changes in her community:

During the holidays, our local school used to lie vacant. Three years ago, several members of our community decided that we were wasting a useful resource. Our kids complained of boredom, wanted to go swimming, skateboarding, play ball. ...

We got in touch with the school’s board of trustees, and after much discussion, especially in relation to responsibilities and issues of safety, we all agreed that the children could use the school facilities during holiday periods, as long as adult supervision was in place.

What a summer we all had that first year we were able to use the school grounds.

- To denote text that you have omitted from your quoted passage, use ellipses (refer Section 4.5 of this guide).
- Set down the quoted text exactly as given in the original, including any incorrect spelling, punctuation, or grammar. If these errors might confuse readers, insert the word “sic” in square brackets, immediately after the error.

“Queen Elizabeth I [sic] came to the throne in 1952.”

However, you can change the first letter of the first word in quoted text to an upper case or lower case letter so that the quoted material better fits the sense of the text containing the inserted quotation. You can also change punctuation at the end of the quotation to suit the sense of the full text. You can furthermore change double quotation marks to single quotation marks, or vice versa, in line with the treatment used in the main text.

- If the quote has italicized words, or if you choose to italicize some words, you must explain this emphasis. You can do this immediately after the words by writing in square brackets the following: [italics added], or [italics in original], or [emphasis mine], or [emphasis in original]

“The pertinent point is this: Queen Elizabeth II came to the throne the year / *was born* [emphasis original].”

Alternatively, you can include this indication in round brackets immediately after the whole quote:

“Never give out your PIN, not even to family members” (Big Bold Bank, 2013, p. 1, emphasis mine).

Use the first method if the emphasized words are a mix of the original writer’s and yours. Use the second if the italics cover only one or several words in just one place.

5.10 Statistical and mathematical copy

Refer Sections 3.53 to 3.61 of the fifth edition of the APA manual and Sections 4.41 to 4.49 of the sixth

Because conventions regarding the presentation of statistical and mathematical copy (e.g., symbols used, font requirements, placement of items on the page) are particularly complex and involve specialist typography, we direct you to the relevant sections of the APA manual (noted immediately above). We also suggest that you refer to specialist publications in your field or area of interest where necessary.

In general, however, symbols for physical quantities are single letters of the Latin or Greek alphabets, with or without subscripts or superscripts. Use boldface italic type for vectors and use boldface sans serif italic type for tensors of the second rank. You can choose which symbols to use, within reason. Make sure you do not create inconsistencies or provide misleading notations, or any notation that could seriously complicate typesetting.

5.11 Tables, figures, and other illustrative material

Refer Sections 3.62 to 3.89 of the fifth edition of the APA manual and all of Chapter 5 of the sixth

- Use Arabic numerals (1, 2, 3 ...) to refer to all tables and figures (both line illustrations and photographs) in the text. If a figure consists of several parts, label the parts a, b, c, etc. Note that in some circumstances, the separate parts of a figure can have entirely separate legends.

- For figure legends, use sentence capitalization. Punctuate as you would for ordinary text, and end the legend with a full point (period). Place the heading beside the number, with the number ending with a period or colon. Set the number in italic type and the legend in roman (not italic) type. For references to individual parts of a figure, use the letters a, b, c, also in plain type:

Figure 1: Enrollment in education in (a) 1984, (b) 1994, and (c) 2004.

- Set notes to tables and figures at the bottom of each table or figure, in a smaller font than that used for the main part of the table/figure. Set the three types of notes to tables and figures in the order of *general* note, *specific* note, and *probability* note (see example on opposite page). For tables and figures replicated or adapted from tables and figures in other documents, make sure you include a full source note as part of the general note. Indicate specific notes by *superior* roman letters: ^{a, b, c}. Set each specific and probability note on a new line. A note giving the source of the figure or table or the source of the information in those items can either be set as a general note or prefaced with the word “Source” (consult example).
- Please note that figures may be printed in color in some IEA ebooks but in black and white in print. This difference has relevance for figures where bars and lines need to be clearly differentiated from one another. Use strong gradations of black through to light gray, or use some other method, such as solid lines, dotted lines, broken lines, solid bars, or cross-hatched bars to create a clear distinction.

Table 5. *Percentage of the state budget allocated to education*^a

Year	Primary	Secondary	Postsecondary/ nonuniversity	University
2001	71.5	21.7	–	6.8
2002	61.5	25.3	–	13.2
2003	57.6	27.7	1.0 ^b	14.7
2004	47.4	27.7	2.8	22.1
2005	43.7	36.1	0.3	16.9

Notes:

^a Data obtained from state budget of the respective years.

^b Second semester of 2003 only.

Table taken from *Trends Data on Schools and Schooling*, by J. Erewhon, 2006, Cape Town, South Africa, Avencis, p. 64.

OR

Notes:

^a Data obtained from state budget of the respective years.

^b Second semester of 2003 only.

Source: Based on information in *Trends Data on Schools and Schooling*, by J. Erewhon, 2006, Cape Town, Avencis, pp. 64–65.

**SECTION
SIX**

**Reference/
Source Citations,
Reference Lists, and
Bibliographies**

This section discusses two matters:

1. How references (attributions to information from another author or author body) should be cited in the text; and
 2. How references (and other items) should be styled in the reference list or bibliography.
- *For presenting source citations in the main body of the text refer to Sections 3.94 to 3.103 of the fifth edition of the APA manual and to Sections 6.11 to 6.21 of the sixth edition*
 - *For compilation of reference lists and bibliographies, refer to all of Chapter 4 of the fifth edition of the APA manual and to Sections 6.22 to 6.32 as well as all of Chapter 7 of the sixth*
 - *For reference changes and conventions arising from electronic (digital) publishing, see especially Section 6.31 of the sixth edition of the APA manual*

6.1 Some general notes

- IEA uses the author/date system of referencing, and “styles” the elements of the bibliographic citations both within the text and in the reference list/bibliography according to the conventions set down in the *Manual of the American Psychological Association*. These conventions are commonly referred to as the APA method of referencing.
- A **references list** contains only those bibliographic references cited in the text. A **bibliography** contains those bibliographic references cited in the text *and* references not cited in the text but read by the author because of their pertinence to the topic at hand.
- **Nonperiodicals** include books, reports, brochures, some monographs, manuals, and audiovisual media.
- **Periodicals** are documents published on a regular basis. They include journals, magazines, some monographs, and newsletters.
- An **edited book** is one that draws together the work of different authors under the guidance and management of one or more people who are given the designation “editor.” An “edited book” in this sense does not mean a book that is subject to copyediting.

Irrespective of the referencing system used, each citation must contain the following elements:

- **Nonperiodical (book, report, monograph)**
 - author’s (or authors’) surname(s) and initials or the full name of an organization if it acts as an author body (e.g., Department of Foreign Affairs)

- date of publication
- title and subtitle of publication
- volume number (if applicable)
- edition number (but only if second or subsequent)
- place of publication
- publisher

Example:

Almond, J. J., & Bolt, K. C. (2001). *Teaching today and tomorrow*. Manson, CA: Livery Publications.

Almond, J. J., & Bolt, K. C. (2004). *Teaching in the twenty-first century* (Vol. 1, 2nd ed.). Manson, CA: Livery Publications.

- **Part of a nonperiodical (e.g., chapter in an edited book)**
 - author's (or authors') surname(s) and initials
 - date of publication
 - title of chapter
 - name of book's editor or editors
 - title and subtitle of publication
 - volume number (if applicable)
 - edition number (but only if second or subsequent)
 - page numbers of book on which the article or chapter appears
 - place of publication
 - publisher

Example: Randolph, K. (2006). Decentralization. In J. Meakes (Ed.), *Schools around the world* (pp. 126–130). Manchester, UK: Scholastic Press.

- **Periodical**
 - author's (or authors') surname(s) and initials
 - date of publication
 - title and subtitle of article
 - title of periodical
 - volume and issue numbers
 - page numbers of periodical on which the article appears

Example: Martinez, V., & Fratila, J. (2001). Revisiting concerns about boys' achievement. *Issues in Gender*, 4(6), 125–115.

- **Online documents/periodicals**
 - If a document, include the same elements as for a book, but also include the website uniform resource locator (URL).
 - If an article in an online journal, include the same items as for a periodical (or as many of these are available for each), but also including the URL or the digital object identifier (DOI), if one has been assigned.

Note:

- If no date is apparent on the source document, use n. d. (which stands for “no date”) in the usual position for the date in the reference.
- Online documents may not have page numbers, which means (obviously) that this information is excluded from the citation.
- It is not necessary to include the URL if a DOI is present.
- Do not place full points (periods) at the end of URLs and DOIs.
- APA no longer requires authors to state the date on which they retrieved a document from internet.

Examples:

Douglas, K. M. (2003). Saying is not enough: Enhancing students’ oral expression in the classroom. *Just for Teachers*, 4(6), 54–63. Retrieved from http://www.justforteachers.net/subscribe_5a.html

Stanton Foundation. (n. d.). What motivates them? Mothers as student-teachers. *The Teaching Profession*, 5(3): doi:11:1067/dendrite.lmnp.670034

6.2 Citations in the text

- The name/date system uses author name and date of publication to identify the work. Enclose both in parentheses if the reference is parenthetical, and place a comma between the name and the date:
... as was recently reported (Smith, 1979)

However, if the author’s name belongs to the sentence, set only the date in parentheses:

Smith (1979) reports ...

- Give an author’s initials in the reference in the text only if readers are likely to confuse that person with another author of the same name. If the work is one for which a full reference is not given, initials, or indeed full names, should be retained. It is perfectly legitimate to refer to, for example, “the work of Einstein, of G. B. Hardy, or of Niels Bohr.”
- Distinguish several publications by the same author in the same year by following the date with lower case letters. Also, when citing several references in the same parentheses, order them alphabetically, separating each entry with semicolons:
(Borland, 1999a, 1999b; Emiland, 2003)
- Use an ampersand instead of “and” for citations that have two or more authors, but only if the citation is in parentheses. For citations in the text that refer to a publication by two or more authors, use “and”:
(Rachelle, Moreau, & Aspery, 2001)
Rachelle, Moreau, and Aspery (2001) confirmed that ...

- For publications with **two** authors, give both names each time you cite the reference.
- For publications that have **three, four, or five** authors, give all names on first mention in the text, and thereafter provide the first name followed by et al. (note, typed in roman, not italic, and with a period after the “al”):

First mention in text: According to Waverly, Hollywood, Russell, Demirole, and Blake (2005)...

Subsequent mentions: Waverly et al. (2005) considered that ...

Note: Omit the date if the second and subsequent mentions occur in the same paragraph as the first citation.

- For publications with **six or more** authors, give the name of the first author and use “et al.” for the first and all subsequent citations of this source.
- If citations refer to specific passages in books or articles, the correct styles are:
(Fairlie, 1997, p. 9), (Fairlie, 1997, pp. 9–23), (Fairlie, 1997, chap. 5)
- To cite secondary sources, refer to both sources in the text but include in the reference list or bibliography only the source that you actually used:

Text: According to Tobias and Hanlon (2003), cited in Rabinowitz and Samuels (2006) ...

References/Bibliography: Rabinowitz, E. L., & Samuels, D. D. (2006). *School truancy: A cross-country analysis*. New York, NY: Pendlebury Scholastic.

6.3 Reference list/Bibliography

- List entries in strict alphabetical order by author name.
- Alphabetize authors’ surnames letter by letter, exactly as spelled in the text. Thus, prefixes such as de, De, van, von count only if one would not refer to the author’s surname without them. Order names starting with M’, Mc, and Mac literally, and not as if they were all spelled *Mac*. The following list is correctly ordered:

Beethoven, L. van

de Haas, W. J.

DeShazer, L.

Hume-Rothery, W.

MacWilliam, A.

Maugham, W. S.

McAbbot, B.

Van Vleck, J. W.

Vaughan-Williams, R.

- Order publications by the same author or group of authors chronologically, by year of publication. Assign letters to works published in the same year by the same author or group of authors: 1977a, 1977b, etcetera.
- Give all author names in the order listed on the publication. However, if the reference has **six or more** authors, give the names of the first six and then use ellipsis to signal the missing names, followed by the name of the last author:
Saturn, Y., Pluto, G., Uranus, W., Mars, D., Earth, Z., Venus, P., ... Moon, B. (2014). *The solar system: An autobiography*. London, UK: Interplanet Publishing.
- Do not include honorifics (Dr, Sir, Ms) with author names.
- List periodical articles and chapters within edited books under their individual authors. List the whole journal or book only if the reference in the text is to it alone. In this instance, list the journal alphabetically by its title name, and the edited book under the names of its editor(s), with the abbreviation Ed. or Eds. in parentheses after the last editor's name.
- Note that for citations for chapters in edited books, the names of the editors are presented in the order of initials and then surname:
Aliem, D. (1995). Guidelines for safe school-yards. In M. N. Manson & R. H. Richards (Eds.), *The modern school* (pp. 24–35). Sydney, NSW, Australia: Botany Bay Press.

If the editors' names begin the reference, the usual convention of initials after surnames applies.

6.4 Styling

Publishing houses and organizations differ in how they choose to order, punctuate, and capitalize the elements of bibliographic citations. APA sets out clear guidelines on its preferences in this regard.

These preferences take time to learn, especially as they can appear idiosyncratic, and even the aid of styling software, such as Endnotes, does not always guarantee exact adherence to this style. Close reference to the APA manual and to references lists and bibliographies styled according to APA preferences will help you.

- With APA style, the ordering, punctuation, and capitalization of nonperiodical citations differ in several respects from the ordering, punctuation, and capitalization of periodical citations. For the styling of each, see the examples in the text in Section 6.1, pages 66–68.

- If the information in these examples does not “fit” the document/information item you have at hand, refer to the APA manual for guidance. Examples of such documents/items include (among many others):
 - abstract from a secondary source
 - blog posting
 - Educational Resources Information Center (ERIC) document
 - doctoral dissertation
 - document accepted for publication but not yet in printed form
 - message posted to online newsgroup, forum, discussion group
 - report from corporation
 - report from government agency
 - legislation
 - Master’s thesis
 - personal communications (e.g., letter, email)
 - photograph
 - published proceedings of a meeting
 - social media postings (Facebook, Pinterist, Instagram, tweets, twitters, etc)
 - unpublished document
 - website
- Ensure that each reference citation includes the required set of elements. Do not leave off, for example, page numbers for periodical citations (assuming the articles in the periodical have page numbers), and the place of publication and name of the publisher for nonperiodical citations.

Some specific style points

- *Abbreviations*: Publication details such as edition number, volume, or whatever should be abbreviated according to these examples:
2nd ed.; Vol. 23; Pt. 2
- *Ampersand*: Use this instead of “and” when giving authors’, editors’, and translators’ names in reference lists or bibliography citations:
Chester, D. D., & Watson, X. M.
- *Capital letters*: For the titles of nonperiodicals (e.g., book title), use an initial capital letter only for words that begin the title, are a proper noun, or are used within the document with an initial capital. The same rule applies to the titles of chapters within edited books, and to articles within periodicals. The initial letters of the words of a periodical title (e.g., journal) each take a capital except for articles (the, a) and short prepositions (on, at).

- *Commas and full points*: Pay careful attention to the use of full points (periods) and commas in reference citations:
 - Commas separate the names of authors even when there are only two authors:
Sutherland, D., & Gregoire, S.
 - The same rule applies to the names of editors and translators if their names begin the citation:
Brownlee, J. E., & Stephanos, S. M. (Eds.), *Cognitive development in neonates*. London, UK: Emerald Press.
 - However, do not use commas to separate the names of two translators or two editors used further into the reference.
Remington, D. N. (2003). Neural pathways. In J. E. Brownlee & S. M. Stephanos (Eds.), *Cognitive development in neonates* (pp. 201–216). London, UK: Emerald Press.
 - Use a full point after abbreviations, except for the abbreviations of numbers (thus, Vol., Ed., 2nd ed.), and note that the period always sits outside the parenthesis enclosing the publication date. Thus:
Sutherland, D., & Gregoire, S. (2004). *Teacher talk, student talk ...*
- *Italics*: Italicize the titles of nonperiodicals and periodicals. Do not italicize the titles of chapters and of periodical articles. Italicize the volume numbers of periodicals, but not of books and reports.
- *Page numbers*: Give full page numbers: for example, pp. 712–719, not 712–19; pp. 54–58, not 54–8. Note that many electronic sources do not give page numbers. If paragraph numbers are visible, use the paragraph symbol and the number (e.g., ¶ 3). If not, give the nearest heading, and then the number of the relevant paragraph under it (e.g., Introduction, ¶ 3). If there is no discernible means of providing a location reference, omit the location.
- *Place of publication*: It is sufficient to give just one location of publication, which should be the first place listed on the title page of the book cited.
- *Publisher*: Give the publisher's name in as brief a form as is intelligible. Delete terms such as “Co.,” “Inc.,” and “Ltd.,” but retain words such as “Press” and “Books.”
- *Translations*:
 - Translate book titles, chapter titles, and periodical articles in periodicals that are in languages other than English into English. Note that you do not need to translate the title of the periodical.

- For a reference in a language other than English the same as you would a book in English, retain the upper and lower casing of initial letters of the words in all titles (i.e., chapter title, article title, book title) as presented. Provide the translation in English in plain text (not italic) immediately after each title.
- Use the upper and lower case conventions used for any English reference title:
 Inhelder, B., & Piaget, J. (1959). *La Genese des structures logiques elementaires* [The growth of logic in the child]. Paris, France: Delachauz and Niestle.
- Translate bibliographic information. Thus, Vol. not tome or Band; rev., not verb.
- Give the place of publication in English form, but the publisher's name as it appears in the book (but in roman font).
- For a work that has been translated into English, follow this arrangement:
 Foerr, E. R., & Ravellez, M. N. (2002). *Disquiet and displeasure* (E. Jamieson, Trans.). Palo Alto, CA: Watsford Academic Press.

**SECTION
SEVEN**

**Use of IEA
Publications,
Study Instruments,
Survey Items, and
IEA Logo**

7.1 Introduction

As an academic research institution, IEA is committed to the principle of recognizing and protecting the intellectual property (IP) of academic researchers and writers. The association therefore strives to ensure that all of its published written and visual content, whether packaged in print or digital form, complies with this principle. Compliance in this context means honouring the conventions of copyright law. IEA requests that anyone citing or using IEA-published content also adheres to this principle.

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All IEA online and printed publications, study instruments, released survey items, manuals, software (such as the IEA IDB Analyzer), and website content pertaining to all studies conducted by IEA is the intellectual property of IEA and therefore is and will remain the copyright of IEA.

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- (b) receive written permission from IEA for their use.

Fair dealing/use of IEA content

The following websites provide useful descriptions of fair use and dealing:

<https://www.gov.uk/exceptions-to-copyright>

<http://www.copyright.gov/fls/fl102.html>

The boundary between fair use/dealing and copyright infringement is not clearly defined. Understandings of these boundaries, usually based on case law built up over time, vary from country to country and with respect to the type of copyrighted material (e.g., book, report, musical

scores, poetry, questionnaire items, photographs, paintings, figures, tables and so on).

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Please remember that even if the content does satisfy fair use/dealing convention, you must print an acknowledgment of the source of that content. Reproducing content without naming the source may constitute plagiarism for which you can and will be held accountable. For information on wording acknowledgement (attribution) statements, please see below.

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- Books
- Reports
- Chapters within books and reports written by different authors
- Periodical (journal) articles
- Monographs
- Policy briefs
- Occasional papers
- Websites and any IEA resources (downloadable or otherwise) held on them
- Study instruments (questionnaires, surveys, achievement tests)
- The released (into databases) items from these instruments
- Figures, tables and other illustrative material.
- Software

Source attributions to excerpts from or reference to most of these materials follow American Psychological Association (APA) practice. Section Six of this guide provides guidance in this regard.

Source attributions for *all or any part of a released instrument item or set of instrument items* should follow the wording given in these examples.

- SOURCE: *TIMSS 2011 Assessment*. Copyright © 2013 International Association for the Evaluation of Educational Achievement (IEA). Publisher: TIMSS & PIRLS International Study Center, Lynch School of Education, Boston College, Chestnut Hill, MA and International Association for the Evaluation of Educational Achievement (IEA), IEA Secretariat, Amsterdam, the Netherlands.
- SOURCE: *ICILS 2013 Assessment*. Copyright © 2015 International Association for the Evaluation of Educational Achievement (IEA). Publisher: International Association for the Evaluation of Educational Achievement (IEA), IEA Secretariat, Amsterdam, the Netherlands.

Source attributions for *tables, figures and other illustrative material* should follow the wording given in these examples.

- If the figure or table is reproduced exactly as it appears in its IEA-published form:
SOURCE: Figure reproduced from J. Fraillon, J. Ainley, W. Schulz, T. Friedman, & E. Gebhardt, *Preparing for life in a digital age: The International Computer and Information Literacy Study international report*, 2014, International Association for the Evaluation of Educational Achievement (IEA), Amsterdam, the Netherlands, p. 37.
- If the figure of table is an adapted version of the original:
SOURCE: Table adapted from Table 3.6 in J. Fraillon, J. Ainley, W. Schulz, T. Friedman, & E. Gebhardt, *Preparing for life in a digital age: The International Computer and Information Literacy Study international report*, 2014, International Association for the Evaluation of Educational Achievement (IEA), Amsterdam, the Netherlands, p. 96.

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- Source note:
SOURCE: Figure taken from J. Fraillon, J. Ainley, W. Schulz, T. Friedman, & E. Gebhardt, *Preparing for life in a digital age: The International Computer and Information Literacy Study international report*, 2014, p. 117, and reproduced with the kind permission of the publisher. Copyright © 2014 International Association for the Evaluation of Educational Achievement (IEA). Publisher: International Association for the Evaluation of Educational Achievement (IEA), IEA Secretariat, Amsterdam, the Netherlands.

- **Acknowledgments note:**

Tables 1.4 to 1.7 in this report are reproductions of Tables 6.1 to 6.4 in Chapter 6 of *Preparing for life in a digital age: The International Computer and Information Literacy Study international report*, written by Julian Fraillon and colleagues and published by the International Association for the Evaluation of Educational Achievement (IEA) in 2014. We thank the association for its permission to reproduce these tables

- **Footnote:**

This chapter [or ‘text’ if you post the chapter on your website] originally appeared as Chapter 2 in P. Mirzchiyski, *Providing school-level reports from international large-scale assessments: Methodological considerations, limitations, and possible solution*, 2013, pp. 13–18, and is included in this document [website] with the kind permission of the publisher. Copyright © 2014 International Association for the Evaluation of Educational Achievement (IEA). Publisher: International Association for the Evaluation of Educational Achievement (IEA), IEA Secretariat, Amsterdam, the Netherlands.

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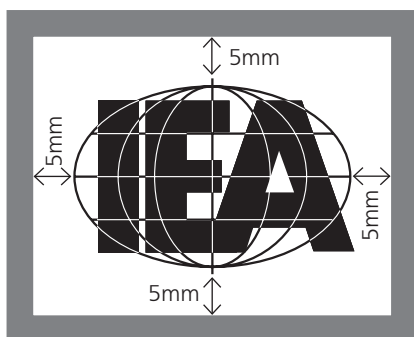
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7.6 Use of the IEA logo

IMPORTANT NOTE: IEA logo

IEA's full name and logo must appear on all publications, whether in print or digital form and whether prepared for or by IEA. The logo needs to be placed on the *front cover* and the *title page* of the text, but with its actual placement on those sites determined by the person designing the publication.

The IEA logo should appear only in a horizontal position. The minimum size for the IEA logo is 15 mm wide (25 mm wide on the title page and 35 mm wide on the front cover); maintain at least 5 mm space around the logo on all sides. A sans serif typeface should be used for the IEA name in full.



Clear space around logo



←15mm→

Minimum
size



←25mm→

Title page size



←35mm→

Front cover size



**International Association
for the Evaluation of
Educational Achievement**



**International Association
for the Evaluation of
Educational Achievement**

To obtain a copy of the logo and further guidance on its placement,
please contact the following:

IEA Secretariat
Herengracht 487
1017 BT Amsterdam
The Netherlands
Phone: +31 (0) 20 625 3625
Fax: +31 (0) 20 420 7136
Email: department@IEA.nl
Website: www.iea.nl

APPENDICES

**Reference/
source citations,
reference lists, and
bibliographies**

Appendix 1: Examples of spelling conventions

adviser	decisionmakers
advisory	decisionmaking (<i>noun and adjective</i>)
agemate	defense
aging	diagramed
analog	disc (<i>but disk if computer terminology</i>)
analyze	dispatch
antisocial	e-book
appendixes/appendices	e-learning
artifact	email
audiotape	encyclopedia
audiovisual	end point
Bachelor of Science, <i>but</i> Bachelor's degree	enroll
baseline	enrolling
behavior	extracurricular
bilingual	extravert
canceled	favor
caregiver	feedback
caregiving	flow chart
caretaker	focused
catalog	follow-up
center	formulas
classmate	framework
coeducation	fulfill
coauthor	fulfillment
collinear	gauge
color	gray
controlled	guideline
controlling	halfway
cooperate	homework
coordinate	indices
counseling	inflowing
counselor	input
counterclockwise	inservice
coworker	instate
crosscultural	install
crosshatched	installment
cross-link	interstimulus
crossnational	intraspecific
cross-reference	judgment
cross-section	kilometer
crystallize	
cutoff (noun)	

labeled
labor
leveling
license (*noun*)
license (*verb*)
lifespan
lifestyle
lifelong
lifetime
loudspeaker

matrices (*math*)
medieval
meter
microfilm
mileage
misspell
misstatement
modeled
mold
moneys
multiphase

nationwide
nonsignificant
northeast

ongoing
organization
organize
outflow
output
overaggressive

percent
percentage
percentile
posttest
policymaker
policymaking (*noun and adjective*)
practice (*noun and verb*)
pre-experimental
preschool
pretest
printout
problem-solving (*noun and adjective*)
program
programmed

pseudoscientific
psychometric

re-evaluate
re-examine
reinforced
resensitize
résumé

self-concept
self-image
semidarkness
sensorimotor
side-effect
sizable
socioeconomic
southeast
Southeast Asia
spatial
stepwise
subject-matter
subsection
subtest
superordinate
supersede
supraliminal

textbook
threshold
time frame
time lag
tie line
tire
traveling
tunneling

ultrahigh
unbiased
underdeveloped
upper-secondary school
usable
utopia
utopian
vertices

wellbeing

while (*not whilst*)
worldwide

x-ray

zeros

Appendix 2: Sample hyphenated and nonhyphenated words and phrases

ability-to-follow-instructions test	learner-centered approach
above-mentioned examples	left-hand side
all-or-none questionnaire	long-range order
amino acid compound	low-frequency words
anxiety-playing condition	low-income groups
bell-shaped curve	machine-readable form
best-fit data	make-up (<i>noun</i>)
best-known product	man-made fiber
body-centered lattice	mental ability test
boundary-value problems	middle-class (<i>adj.</i>)
by-product	multiple-choice test
child guidance centers	multiple-response item
child-rearing practices	non-achievement-oriented students
classroom observation techniques	numerical aptitude test
competency-based education	open-plan school
comprehensive high school	order-of-magnitude calculation
computer-assisted learning	part-time (<i>noun and adjective</i>)
criterion-referenced testing	primary-school students
crosscultural education	role-playing technique
crossnational study	room-temperature experiment
cross-linked fibers	school-leaving age
cross-reference	secondary-school teachers
culture-free test	self-concept
cumulative rating scale	self-image
day care center	self-report
draw-a-man test	semantic differential technique
early childhood education	sensory-motor period
elementary school students	sex-linkage (<i>noun</i>)
family-life education	sex-linked (<i>adjective</i>)
first-order transition	short-term memory
full-time (<i>noun and adjective</i>)	socioeconomic status
grade point average	sodium chloride solution
half-width (<i>noun and adjective</i>)	spatial ability test
high-anxiety group	student-centered curriculum
high-school teachers	student-paced learning aids
higher-level cognition	teacher-training college
lead-in	test-wiseness
least squares solution	time-frame
	time-lag

to-be-recalled items
trial-by-trial analysis
two-year course
two-thirds
two-meter pole
two meters

up-to-date (*adjective*)
upper-elementary schools
upper-secondary schools

water-deprived animals
well-defined (*adjective*)
well-known (*adjective*)
well-ordered (*adjective*)
widely used test
working-class (*noun and adjective*)
work-study program

Appendix 3: Recommended abbreviations

All entries marked with an asterisk need not be spelt out at first mention. All others should be. Note that some abbreviations listed with an initial lower-case letter may take a capital letter in some instances, such as Vol. (for Volume) in APA-styled bibliographic citations.

American Educational Research Association	AERA
American Psychological Association	APA
amplitude modulation	AM
anno domini*	AD (small even caps)
ante meridiem*	a.m.
antilogarithm*	antilog
approximate (in subscript)	approx
arccosecant *	arccsc
arccosine*	arccos
arccotangent*	arccot
arcsecant*	arcsec
arcsine*	arcsin
arctangent*	arctan
average (in subscript)	av
Bachelor of Arts*	B.A.
before Christ	BC (small even caps)
before present	BP (small even caps)
chapter*	chap.
chapters*	chaps.
cologarithm	colog
Company*	Co.
competency-based teaching	CET
competency-based teacher education	CBTE
<i>confer</i> (compare)	cf.
Corporation*	Corp.
cosecant*	csc
cosine*	cos
cotangent*	cot
cubic	cu
deoxyribonucleic acid	DNA
District of Columbia	DC
Doctor of Philosophy	Ph.D.
editor*	Ed.
edition*	ed.
Educational Resources Information Center	ERIC
electroencephalograph	EEG

European Economic Community	EEC
European Union	EU
English as a foreign language	EFL
English as a second language	ESL
equation*	Eqn.
equations*	Eqns.
<i>et alii</i> (and others)*	et al.
<i>exempli gratia</i> (for example)*	e.g.
experiment(al) (in subscript)	expt
exponential*	e, exp
figure*	Fig.
figures*	Figs.
gross domestic product	GDP
gross national product	GNP
hyperbolic cosecant*	csch
hyperbolic cosine*	cosh
hyperbolic cotangent*	coth
hyperbolic secant*	sech
hyperbolic sine*	sinh
hyperbolic tangent*	tanh
<i>id est</i> (that is)*	i.e.
IEA Data Processing and Research Center	IEA DPC
IEA-ETS Research Institute	IERI
Incorporated*	Inc.
intelligence quotient	IQ
International Association for the Evaluation of Educational Achievement	IEA
International Bureau of Education	IBE
International Baccalaureate	IB
International Council for Educational Development	ICED
International Critical Tables	ICT
International Development Research Center (Ottawa)	IDRC
International Institute for Educational Planning	IIEP
international research center	IRC
international steering committee	ISC
less-developed country	LDC
limit*	lim
logarithm*	log
logarithm (natural, base e)*	ln
Master of Arts	M.A.
maximum	max
minimum	min

National Assessment of Educational Progress	NAEP
national research coordinator	NRC
not available	NA
not determined	ND
number*	no.
observed (in subscript)	obs
Organisation for Economic Co-operation and Development	OECD
page*	p.
pages*	pp.
Part*	Pt.
Personalized System of Instruction	PSI
point	pt.
post meridiem	p.m.
Programme for International Student Assessment	PISA
Scholastic Aptitude Test	SAT
secant*	sec
section*	sect.
sections*	sects.
series*	ser.
sine*	sin
socioeconomic status	SES
square	sq
standard temperature and pressure	STP
Stanford International Development Education Center	SIDEC
stimulus-response bonds	S-R bonds
supplement*	suppl.
Système International*	SI
tangent*	tan
Teaching English as a foreign language	TEFL
total (in subscript)	tot
translation*	trs
United Kingdom*	UK
United States*	USA
versus	vs
<i>videlicet</i> (that is to say, namely)	viz.
volume*	vol.
volumes*	vols.

Appendix 4: List of countries (including IEA member education systems)

Asterisks denote IEA member education systems.

Note that this list does not include territories, colonies, and dependencies. For a list of these, go to: <http://www.infoplease.com/ipa/A0762461.html>

Afghanistan	Chinese Taipei*
Albania	Colombia*
Algeria	Comoros
Andorra	Congo (Brazzaville)
Angola	Congo, Democratic Republic of the
Antigua and Barbuda	Costa Rica
Argentina	Côte d'Ivoire
Armenia*	Croatia*
Australia*	Cuba
Austria*	Cyprus*
Azerbaijan	Czech Republic*
Bahamas	Denmark*
Bahrain	Djibouti
Bangladesh	Dominican Republic
Barbados	East Timor
Belarus	Ecuador
Belgium-Flemish Community*	Egypt*
Belgium-French Community*	El Salvador
Belize	Equatorial Guinea
Benin	Eritrea
Bhutan	Estonia*
Bolivia	Ethiopia
Bosnia and Herzegovina*	Fiji
Botswana*	Finland*
Brazil*	France*
Brunei Darussalam	Gabon
Bulgaria*	Gambia, The
Burkina Faso	Georgia*
Burundi	Germany*
Cambodia	Ghana
Cameroon	Greece*
Canada*	Grenada
Cape Verde	Guatemala
Central African Republic	Guinea
Chad	Guinea-Bissau
Chile*	Guyana
China, People's Republic of*	

Haiti	Moldova
Honduras	Monaco
Hong Kong, Special Administrative Region (SAR)*	Mongolia
Hungary*	Montenegro
Iceland*	Morocco*
India	Mozambique
Indonesia*	Myanmar
Iran*	Namibia
Iraq	Nauru
Ireland*	Nepal
Israel*	Netherlands, The*
Italy*	New Zealand*
Jamaica	Nicaragua
Japan*	Niger
Jordan*	Nigeria*
Kazakhstan*	Norway*
Kenya*	Oman
Kiribati	Pakistan
Korea, North	Palau
Korea, Republic of*	Palestine*
Kuwait*	Panama
Kyrgyzstan	Papua New Guinea
Laos	Paraguay
Latvia*	Peru
Lebanon	Philippines, The*
Lesotho	Poland*
Liberia	Portugal*
Libya	Qatar*
Liechtenstein	Romania*
Lithuania*	Russian Federation*
Luxembourg*	Rwanda
Macedonia*	Saint Kitts and Nevis
Madagascar	Saint Lucia
Malawi	Saint Vincent and The Grenadines
Malaysia*	Samoa
Maldives	San Marino
Mali	São Tomé and Príncipe
Malta	Saudi Arabia
Marshall Islands	Senegal
Mauritania	Serbia
Mauritius	Seychelles
Mexico*	Sierra Leone
Micronesia, Federated States of	Singapore*

Slovak Republic*
Slovenia*
Solomon Islands
Somalia
South Africa*
Spain*
Sri Lanka
Sudan
Suriname
Swaziland
Sweden*
Switzerland
Syria

Tajikistan
Tanzania
Thailand*
Togo
Tonga
Trinidad and Tobago
Tunisia
Turkey*
Turkmenistan
Tuvalu

Uganda
Ukraine
United Arab Emirates*
United Kingdom (UK)*
(members England and Scotland)
United States (USA)*
Uruguay
Uzbekistan

Vanuatu
Vatican City (Holy See)
Venezuela
Vietnam

Western Sahara (proposed state)
Western Samoa

Yemen

Zaire
Zambia
Zimbabwe

Appendix 5: Manuscript submission checklist

Some of the elements in the following table may not apply to your manuscript. A journal article, for example, will not have all or most of the items included under “Front Matter”

Title page	Title and subtitle	<input type="checkbox"/>	
Authors/Editors	All author/editor names included	<input type="checkbox"/>	
	Email address of corresponding author included	<input type="checkbox"/>	
Front matter	Dedication	<input type="checkbox"/>	
	Foreword	<input type="checkbox"/>	
	Preface	<input type="checkbox"/>	
	Acknowledgments	<input type="checkbox"/>	
	Tables of contents	<input type="checkbox"/>	
	List of tables	<input type="checkbox"/>	
	List of figures	<input type="checkbox"/>	
	List of contributors	<input type="checkbox"/>	
Table of contents	List of abbreviations	<input type="checkbox"/>	
	Monographs: first two levels of heading	<input type="checkbox"/>	
	Books and reports: chapter headings and two levels of heading	<input type="checkbox"/>	
	Contributed books: chapter titles and names of authors	<input type="checkbox"/>	
Abstract (if required) for each chapter	All headings correspond to those in text	<input type="checkbox"/>	
	If required, for each chapter	<input type="checkbox"/>	
	Keywords	If applicable	<input type="checkbox"/>
		Reference list	Included either at the end of each chapter or at the end of the book/report (check preference with IEA)
Citations in text agree with citations in reference list			<input type="checkbox"/>
Citations styled to IEA guidelines	<input type="checkbox"/>		
Tables	All tables mentioned in text enclosed, complete and as separate files	<input type="checkbox"/>	
	Prepared in editable format, not as images	<input type="checkbox"/>	
	Placement of each table stated in the text	<input type="checkbox"/>	

	Consecutively numbered within each chapter or, if no chapters, across the document	<input type="checkbox"/>
	Consecutively cited in text	<input type="checkbox"/>
Figures and other illustrations	All figures and illustrations mentioned in text enclosed, complete and as separate files	<input type="checkbox"/>
	Prepared in editable format, that is, not as images	<input type="checkbox"/>
	All other illustrations presented as jpeg not tiff files.	<input type="checkbox"/>
	Placement of each stated in the text	<input type="checkbox"/>
	Consecutively numbered within each chapter or, if no chapters, across the document	<input type="checkbox"/>
	Consecutively cited in text	<input type="checkbox"/>
Electronic manuscript	File folder/zip archive labelled with book/document title and author/editor name	<input type="checkbox"/>
	Each chapter saved as a separate file	<input type="checkbox"/>
	All illustrative material saved as separate files	<input type="checkbox"/>
Contributed books	Email address and affiliation included for corresponding author of each chapter	<input type="checkbox"/>
	Consent to publish form obtained for each chapter	<input type="checkbox"/>
Permissions	Obtained as necessary for all material from other works	<input type="checkbox"/>

Notes

