



REPORT WRITING REQUIREMENTS

Research results are of little value if not disseminated; therefore, it is the normal practice of the Montana Department of Transportation (MDT) Research Program to exert every reasonable attempt to publish and to distribute widely the reports submitted on each project. It is desirable to maintain consistency in style of presentation.

This document is a living document, changing as necessary. Please make sure you have the most recent version when using to prepare reports.

GENERAL REQUIREMENTS

Report Quality

The acceptability of reports is judged by three criteria: (1) fulfillment of project objectives as set forth in the contract, (2) adequacy of documentation, and (3) clarity of presentation. Reports should be complete in all their parts, organized appropriately to serve their purposes, correct in matters of fact and documentation, and edited for basic uniformities of style and usage. Time and effort devoted to the preparation of a quality report are clearly worthwhile investments, because poorly organized and poorly written reports will not be acceptable in fulfilling contract requirements and will be returned for editing prior to MDT review. Reports are expected to be of exceptional quality. "Draft" deliverables are the research team's vision of the complete and final deliverables. All draft deliverables must be spell checked and reviewed by a person. MDT strongly encourages authors to engage professional editors and proofreaders to review reports for compliance with standards and for general readability before they are submitted to MDT for review.

Copies Required

All reports must be submitted electronically, in both MSWord and PDF*. Hard copies of these reports are not required.

*Special note regarding PDF documents: All PDF documents must be prepared using the setting to create fonts as outline. Doing this ensures fonts are sent as "images/outlines" rather than as the actual font, which others may not have.

Report Deadlines and Corrections

Various progress reports, task reports, a final report, a project summary report, and an implementation report are required for all research projects. Other reports may be required for specific research projects. Due dates are as specified in the project contract. At least two months should be allowed for the first review and revision cycle of a draft final report: one month for review and one month for revisions.

Subsequent revisions of the draft final report are due within one to two weeks of receiving report comments; the deadline will be determined by the MDT Research Project Manager. The review and revision cycle will be repeated as many times as necessary before the final products are accepted as final. Only well-written and complete reports following these guidelines will be reviewed by the project panel. It is the responsibility of each principal investigator (PI) to ensure all comments are incorporated into the final report, as appropriate. A line item response is required.

PROGRESS REPORTS

REPORT ORGANIZATION

Contents

1. All reports must be written in the third person.
2. All pages must be numbered.
3. The title page must contain:
 - a. Project title.
 - b. Type and Number, if applicable, of report (for ex: Quarterly Progress Report #1).
 - c. Period covered.
 - d. Prepared by statement.
 - e. Prepared for statement.
 - f. Date (Month, Year).
4. These reports must be in narrative format.
5. The body of these reports must include the following information.
 - a. Discussion of each of the major tasks outlined in the work plan and whether they have been completed or are still in progress.
 - b. Planned and actual time schedule for each of the tasks, including the overall percent complete using the expended versus planned budget.
 - c. Discussion of financial, staff, equipment and technical problems as they affect the individual tasks, as well as their resolution or attempts at resolution.
 - d. Discussion of major accomplishments or discoveries and their significance especially with respect to implementation.
 - e. Fiscal expenditures.
6. All data must be expressed either in metric with the English values following in parentheses or a metric-English conversion chart must be included in each report.

STYLE, FORMATTING, TABLES, FIGURES, AND REFERENCES

Use instructions given below for final reports, as appropriate.

TASK AND INTERIM REPORTS

All Final Report requirements, as detailed below, apply except for the Contents Section 1, 3, and 4; renumber pages as appropriate. Content should be logically organized into discrete chapters with headings as appropriate.

FINAL REPORTS

REPORT ORGANIZATION

Contents

1. MDT will provide the cover page. The Consultant should provide a picture in .jpg format for the cover page.
2. Page i is the title page. It holds this page number, but is not physically numbered. The title page should include:
 - a. Title
 - b. Prepared by statement
 - c. Prepared for statement
 - d. Date (Month, Year)
3. Page ii is the [Technical Report Documentation Page PDF /Word](#). Sections 1, 4-5, 7, 9, and 11-21 need to be completed. All sections, except 1 and 11 need to be completed in draft reports. The abstract must follow [NISO standards](#). A good abstract will help readers find your report and decide to read it; it should briefly tell the reader why the research was important, what results you found, and how your research results will benefit future or change current practices. For more information, see <http://research.transportation.org/Pages/Report-Guidelines-and-Requirements.aspx>.
4. Page iii is the [Disclaimer/Alternative Format Statement page](#). If the author(s) wishes to include acknowledgements, this statement should also be placed on this page.
5. Page iv begins the Table of Contents. The author chooses Table of Contents level of detail; however, this must be consistent from section to section. A List of Figures and List of Tables must follow the Table of Contents, as appropriate. These last two items can be on the same page, if the author so chooses. Pages numbers must occur on these pages, with a dotted line connecting the contents and the page number.
6. In the body of the report, content should be logically organized into discrete chapters. The headings are determined by the author and should be appropriate for the content. Appendices can follow this with supplementary material. The body of the report should be understandable by the intended audience and should include all the information needed to adequately support the conclusions and recommendations presented. Recommendations should be clearly identified.
7. All data must be expressed either in metric with the English values following in parentheses or a metric-English conversion chart must be included in each report.

STYLE

To achieve uniformity and consistency, MDT Research staff use standard reference works for guidance. The latest edition of *Merriam-Webster's Collegiate Dictionary* is the preferred authority for spelling and capitalization. The *Chicago Manual of Style* and *Words into Type* are also generally followed. Following are some rules of style that are designed to ensure reasonable uniformity and consistency. All reports must be written in the third person.

Formatting

1. Type all material 1 to 1.5 spaced, including quotes, references, and so forth on 8½- x 11-in. paper in portrait orientation.
2. To enhance readability, headings should be in a sans serif font and text should be in a serif font.

3. All reports should be in a single column format to facilitate on-line reading.
4. All margins should be 1". Some deviation is allowed on a page-by-page basis to allow for aesthetics.
5. Begin each chapter or appendix on a new page.
6. Do not add blank pages.
7. All pages must be numbered.
8. Paginate the front matter with lowercase roman numerals at the bottom of the page. The Title page holds page i, but is not physically numbered.
9. Paginate the body of the report consecutively with Arabic numerals at the bottom of the page.
10. The Appendices, if any, can be numbered either sequentially from the main body of the report or as A-1, A-2, B-1, etc.
11. All headings at the same level must be in the same font/format.

Tables

1. Tables should convey information clearly and completely, and should stand by themselves.
2. Tables are used to present short descriptions or numerical listings that are most clearly and effectively presented in tabular form. They should be self-explanatory and should supplement, not duplicate, information given in the text and illustrations.
3. All tables must be placed in the text shortly after the first reference to each table; not more than 1 page away from the first reference. Don't split paragraphs with tables.
4. Caption all tables above each table to identify their contents. Titles and legends should be distinguished from the body of the report by placement and a difference of font.
5. Text should appear in a consistent font throughout the report. A font should be chosen for readability and contrast with surrounding text.
6. Cite the source of the table, if applicable, below the table.
7. Arrange tabular matter carefully so that the intended comparisons are clear. Choose appropriate vertical columns to provide reasonable balance to horizontal and vertical dimensions.
8. When a dash (-) or other symbol is used in a table, indicate its meaning in a footnote (e.g., missing data, data not available or applicable).
9. Combine tables of similar form in order to reduce space requirements, eliminate heading duplications, and permit easier comparison of values.
10. Check the accuracy of all values and totals included in tables.
11. Color is preferred, but all visual aspects/features must be clearly identifiable in a black and white copy (i.e., easily distinguishable when printed in black and white).
12. Large tables, which would not be easily readable otherwise, may be presented in landscape orientation or produced on oversize pages. For oversize pages, please contact your Research Project Manager to determine best approach (e.g., don't include oversize tables in report, rather link to a web page or place oversize tables in a separate report volume).

Figures

1. Figures should convey information clearly and completely, and should stand by themselves.
2. All figures must be placed in the text shortly after the first reference to each figure; not more than 1 page away from the first reference. Don't split paragraphs with figures.
3. All figures must be of sufficient quality such that a copy of the printed original is still of sufficient quality for publication.
4. Titles and legends should be distinguished from the body of the report by placement and a difference of font.

5. Text should appear in a consistent font throughout the report. A font should be chosen for readability and contrast with surrounding text.
6. Caption all figures below each figure to identify their contents.
7. Cite the source of the figure, if applicable, below the caption.
8. Use figures of comparable size and scale when they are intended to be compared.
9. Large figures, which would not be easily readable otherwise, may be presented in landscape orientation or produced on oversize pages. For oversize pages, please contact your Research Project Manager to determine best approach (e.g., don't include oversize figures in report, rather link to a web page or place oversize figures in a separate report volume).
10. Color is preferred, but all visual aspects must be clearly identifiable in a black and white copy (i.e., easily distinguishable when printed in black and white).

References

Reference sections, unlike bibliographies, list only sources cited in the text and in alphabetical order by author's last name. (Bibliographies generally include all sources consulted, not just those cited in the text, and generally are organized alphabetically.) If any references are cited, the report must contain a Reference or Literature Cited section; however, bibliographies are acceptable as an addition to the literature cited or references section. The listing of references demands absolute accuracy. Because they come from a wide variety of sources, definite rules for the identification of reference materials have been adopted. They should be carefully observed.

1. Cite references in a Literature Cited or References Section alphabetically in order by Author's last name. Within the text, cite by Author's last name and year in parentheses. Example: (Beskow 1998)
2. Be sure that:
 - a. Names are spelled correctly and consistently.
 - b. Initials and dates are correctly given.
 - c. Title of article is given as published.
 - d. ACS (American Chemical Society) abbreviations are used for periodicals and other standard publications.
 - e. Avoid unpublished references. Do not use expressions such as Paper prepared for Presentation or Paper presented at, when publication has occurred. Give only the published location.
 - f. Print the names of journals, proceedings, bulletins, and so forth in italics; print the titles of papers in roman and in quotation marks, thus: Jones, J. J., "A Technical Paper." *Proceedings*, American Society for Testing Materials, Vol. 22, Part II (1922) p. 450.
 - g. In citing (and in listing), if reference is made to the whole work, give the total number of pages; if only to a specific part, give the pages involved. If several separate pages or parts of the same work are referred to at different places in the text, give the entire work in the reference list; in the text, simply use (Author's last name date, pp. 16-21), (Author's last name date, p. 24), or (Author's last name date, Ch. 5). A reference in the list should not be repeated or be referred to by the use of *ibid.*, *loc. cit.*, and so forth.
 - h. Be sure that entries agree with text and other citations of references. Remember that text revisions may require reference changes and vice versa.
 - i. Use the following guide for treatment of reference items [Note: the names and initials of authors (including joint authors) should be inverted]. If format of reference is not listed below, refer to the *Chicago Manual of Style*.

Periodical

Egar, S. L., "Resurfacing Methods Used Successfully on Chicago's Streets." *Engineering News-Record*, Vol. 243, No. 18 (June 23, 1963) p. 25.

Proceedings

Leadabrand, J. A. and Norling, L. T., "An Example of Soil-Cement Treatment." 2nd Int.Conf. on Soil Mech. and Found. Eng., Rotterdam, The Netherlands, Proceedings Vol. 4 (1956) pp. 62-84.

Title

"New Cement Additive." *Engineering*, Vol. 196, No. 5072 (July 1963) p. 9.

Abstract

"Directional Signing on Metropolitan Freeways." Automobile Club of Southern California, Los Angeles, Calif. (July 3, 1963) 11 pp. *Highway Research Abstracts*, Vol. 34, No. 6 (June 1964) p. 10.

Corporate Author

Automotive Safety Foundation, "Traffic Control and Roadway Elements: Their Relationship to Highway Safety." Washington, DC (1963) 124 pp.

Report

Author(s), "Title." *NCHRP Report XXX*, Transportation Research Board, National Research Council, Washington, DC (1975) xx pp.

Book

Author(s), Title. Publisher (year) xx pp.

Part of Book Only

Hickok, B., "Highways." *Sources of Information in Transportation*, Evanston, IL, Transportation Center, Northwestern Univ. (1964) pp. 201-234.

State DOT Report

New York Dept. of Public Works, "Asbestos Admixture in Asphalt Concrete." Physical Research Proj. No. 11. *Engineering Research Series*, Research Rept. RR60-5 (Dec. 1960) 22 pp.

Congressional Document

U.S. Cong., 77th 2d SESS., Committee on Roads, Proposed Highway to Alaska. Hearings...on H.R. 3095, a bill authorizing the construction of a highway to Alaska, Feb. 4, 5, and 6, 1942. Washington, DC, U.S. Govt. Print. Office (1942) 151 pp.

Bibliography

Bibliographies, unlike reference sections, may list sources consulted but not then cited in the text. Bibliographies generally are organized alphabetically. (Reference sections list only the sources cited in the text, organized alphabetically.) A Bibliography may be included as an addition to the literature cited/references section, arrange the entries as one of the following:

1. **Alphabetical Arrangement by Author.** Arrangement by author will include names of persons (authors, editors, and compilers) and corporate bodies (governmental agencies, societies, institutions, and so forth). In listing federal governmental agencies, "U.S." should precede the name of the agency so that such entities may be grouped in the bibliography.
2. **Chronological Arrangement.** A bibliography may be arranged chronologically to show the development of a subject. Entries are then arranged alphabetically by author under the year.
3. **Classified Subject Arrangement.** This arrangement is made on the basis of a systematic division of the subject of the bibliography. Alphabetical author arrangements are used in such lists under each subject.

Each entry in a bibliography provides information that will result in ready identification. Entries must be sufficiently detailed, intelligible, and consistent in form with the style followed throughout the bibliography.

An annotation, in the form of a paragraph, may be placed after the main body of the entry. Compress the annotation to the fewest possible words.

Abbreviations, Acronyms, and Symbols

Abbreviations, acronyms, and symbols must be fully defined the first time they are used in the report; the definition should be given first followed by the abbreviated term in parentheses.

Use of Copyrighted Material

If already published material is used in a report (as in quotations of 50 words or more or use of tables and illustrations), extreme care is necessary to comply with any copyright requirements that may apply. If there is any doubt about whether reprinted material is copyrighted, it should be checked with the author and/or publisher. Permission in writing to use copyrighted material must then be obtained by the research agency, not by MDT staff, from both the author and the publisher. Copies of all correspondence regarding permission to use copyrighted material, particularly the final letters granting permission, should be transmitted to MDT, where they will become part of the permanent file on the particular report.

Particular attention is called to the fact that practically all commercial journals are copyrighted *in toto*, as also are most association journals, all commercial books, many association books and manuals, many special reports (e.g., ASTM, TRB, and so forth), and all newspapers. Because the United States of America is bound by many foreign copyrights, any use of foreign materials should be checked as carefully as materials published in the United States.

After permission to use copyrighted material has been obtained, MDT should be given both a bibliographical reference to the source and a specific tie to the referenced material, particularly figures. For text material, the edition and page (preferably located by lines) should be cited; for tabular material, the page and table number should be given.

Courtesy

Acknowledgment or credit should be given (by footnote, bibliographic reference, or a statement in the text) for use of material contributed or assistance provided, even when a copyright notice is not applicable.

Caveat for Unpublished Work

Some material may be protected under common law or equity even though no copyright notice is displayed on the material.

Proprietary Information

To avoid restrictions on the availability of reports, proprietary information should not be included in reports, unless it is critical to the understanding of the report and prior approval is received from MDT. Reports containing such proprietary information will contain a statement on the Technical Report Documentation Page restricting availability of the report.