



Guidelines for CPUC-ED & California IOU Evaluation Measurement & Verification Reports

Style Guidelines

1. **Be clear.** People often overestimate their own writing abilities, including technical experts. Consider using a professional technical writer, or at a minimum have your draft reviewed by a professional copy editor. You may have done some great research, but unless it's well written, no one will ever know. A good rule of thumb is to read the first sentence of every paragraph and make sure the first sentence represents the main idea in the paragraph, and that the sequencing of the paragraphs flow. Achieving consistency in content, structure, and voice is extremely important when there are multiple contributors to a research project.
2. **Be concise.** Reports should be as short as possible, ideally 50-60 pages. Appendices can be as long as necessary. Executive Summaries should be a maximum of 4 pages.
3. **Use graphics appropriately.** Graphics are attention grabbing therefore reserve their use for clarity and/or impact. Label graphics carefully. The best graphics don't require any explanation in the report to convey a clear message. Employ quality control: Text should match graphics and grammar and spelling should be checked.
4. **Avoid repetition.** We realize that you may have used content from other documents as a starting point. Carefully review those pasted items and ensure that when concepts are repeated, it is for the explicit purpose of clarifying or emphasizing a point. Otherwise, keep repetition to a minimum.

Content Guidelines

1. **Respect multiple audiences.** Main audiences for reports include EE program, CPUC, and IOU staffs. However, all final EM&V reports are publicly available. Do not assume everyone reading the report will be familiar with program details, measures, evaluation methods or terminology. Please explain briefly, while maintaining readability. Consider including a glossary of terms and acronyms.
2. **Explain study scope.** Clearly state the study scope, goals, and limitations and address how this research will add to the current understanding of the subject. Provide an executive summary that allows the reader to remember and recognize the key reasons, conclusions and recommendations of the research effort.
3. **Use trained researchers to report data.** Researchers should have appropriate training and experience to effectively review and report on qualitative data. Poor analysis of qualitative data can lead to inaccurate and misleading conclusions.
4. **Identify all sources of data.** Data need not be quantitative, but all sources need to be very well-identified. Qualitative data are fine, but need to be properly reported and analyzed. Ensure that data sources and reference materials are appropriate. Wikipedia and blogs are not appropriate citations or references for information included in evaluation reports.
5. **Indicate sample sizes and descriptive statistics.** When reporting results and summary statistics, whether in graphics or in the narrative, include standard deviation, min/max, and standard error. The questions on which data tables and data reporting are built need to be in the footnotes or in a table so the reader can properly interpret data in the context of what was originally asked.
6. **Differentiate between conclusions and recommendations.** Ensure that conclusions are (1) very tightly tied to data and (2) logical results emerge from the data and analysis. Recommendations are often helpful but it is important that they also be well-tied to data and data sources. When providing recommendations, identify caveats while distinguishing ideas, opinions, possibilities, and suggestions, from true data-driven recommendations. For example, use words such as “should” or “must” for a recommendation and words such as “can” or “may” for a suggestion.
7. **Explain clearly how the need for each recommendation is supported by your findings.** Specify the measurable benefit that should be the result of following a recommendation. If there are no data showing a need, and if you cannot state a measurable benefit or improvement, do not make that recommendation.
8. **Don't over utilize the "Other" category.** Too often fill-in-the-blank responses or pre-codes are poorly handled resulting in high percentages of responses falling into the “other” category. Too often these responses are ignored and/or not properly analyzed, and therefore represent wasted time and research dollars. Typically, these responses are the result of (1) poor interviewing (2) a bad coding system or (3) a researcher who does not take the time to investigate why a high incidence of “other” is occurring.
9. **Respect confidential data.** Ensure that the report protects all confidential customer information as appropriate.