

Report title

Report subtitle

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USING THIS DOCUMENT

When you open this document, your first move should be to “save as” something else, so that the template isn’t overwritten. This document contains elements that are pre-formatted to expedite the report creation process. Take advantage of this by copying and pasting those elements and using them throughout. When you are finished with the report, come back and delete all of the introductory template material. Please do not add a cover page to this document. The San Diego Workforce Partnership team will create the front and back cover pages for each report.

Note: The table of contents will generate based on the style formatting of headings. All text in the report that uses “Heading 1” or “Heading 2” will appear here. To update:

1. Click on table of contents
2. Click on drop-down arrow next to “Table of Contents” tab
3. Click “update table”
4. Choose “update entire table”

WORKFORCE PARTNERSHIP REPORT FORMATTING

All section headings should use the style “Heading 1” and the main report color. This style automatically adds 10pt additional spacing before a heading, so you’ll notice that it’s a little more than regular double spacing. Body paragraphs use style “Normal” with black text, and there is a single space between sentences. There is no indentation at the beginning of each paragraph. Double space between paragraphs and between paragraphs and other items (e.g., bulleted lists, charts, tables).¹

- Use filled-in round bullet points for lists.
- Capitalize the first word on each bullet.
- Place a period at the end of a complete sentence.

For a numbered list outside of a paragraph, use numbers followed by a period. Use periods at the end of full sentences in the list. When listed items are one or two words or even short phrases, no end punctuation is needed. Use the following format for numbered lists:

1. First point
 - Filled-in round bullets for second-level information
2. Second point
 - No periods for bullets for short phrases
3. Third point
 - Consistent use of periods/no periods in entire bulleted list

Sidebar

You may want to highlight information in a sidebar. If so, copy and paste this one to retain appropriate formatting.

A sidebar may vary in size, as long as it remains rectangular. You may include multiple paragraphs, diagrams, charts or other elements in a sidebar.

In case you delete the formatting, note that the title is 10pt, Arial Bold. The body text is 10pt Arial.

A sidebar should be right-aligned with the margin. In the “shape format” toolbar, click on “position,” “more layout options” and under “horizontal,” select “alignment,” “right relative to margin.” Note that this selection isn’t saved when you drag the textbox somewhere else, so save this step for the end.

¹ Hey there. I’m a footnote. My style is automatically formatted as well. Just click on the “references” tab on the tool bar and click “insert footnote” wherever you want me to go in the text.

For a numbered list within a paragraph that contains more than just one or two words for each item, and that could be confusing if separated by just commas, use figures followed by a single parenthesis: *Example: 1) ... ; 2) ... ; and 3) ...* .

If a bulleted list is being used to break up a long sentence, please use a semi-colon after each line and a period after the final bullet. Also, capitalize each line.

A few general reminders:

- Single space after periods;
- Type out the word when a number is below 10;
- Use serial commas **only** when the sentence may be confusing to the reader;
- Use the active voice as a preference; and
- Use the word “percent” rather than % in running text.

Charts

Each chart should be centered on the page with a title centered above it, and there should be no border around charts. All chart titles should be 10pt Arial, Bold font (use style “chart/figure title”). Note that chart titles should appear in the document text, not within the chart body. All other text should be 10pt, Arial (NO bolding). Text on a chart is usually black, but when more than one color appears on a chart you may use corresponding colors for chart elements and their labels. Additionally, when labels are layered on top of chart elements (like in stacked bar charts) it is often preferred to use white text for better contrast.

General notes on legends: First preference is to avoid legends when possible. For example, a legend isn’t necessary if there is only one data series or when you can label the chart directly. Second preference is to put the legend on top so there is more room for both the data and the legend text. Also consider the order in which content appears on the chart—if the colors appear left-to-right, the legend may be better on top; if top-to-bottom, the legend may support the reader better on the right side.

Each of the examples below will review the formatting guidelines for individual types of charts. To save yourself some time, you may want to copy and paste the examples below, then edit the data. You can right click on any chart and select “edit data in excel” to change the data. **Please make sure all data for charts are embedded within the document, not linked to external excel files.**

Column Chart (Histogram)

- Solid colors, unless showing future projections
 - Future projections should use a striped pattern and have an outline around the column
- Small gap (-15%) between series columns in each category (series overlap)
- 75% gap width between categories
- Legend centered on top of chart
- Data labels included above columns
- No gridlines going through data in the background
- If still readable, remove y-axis

Figure 1: Clustered Column Chart

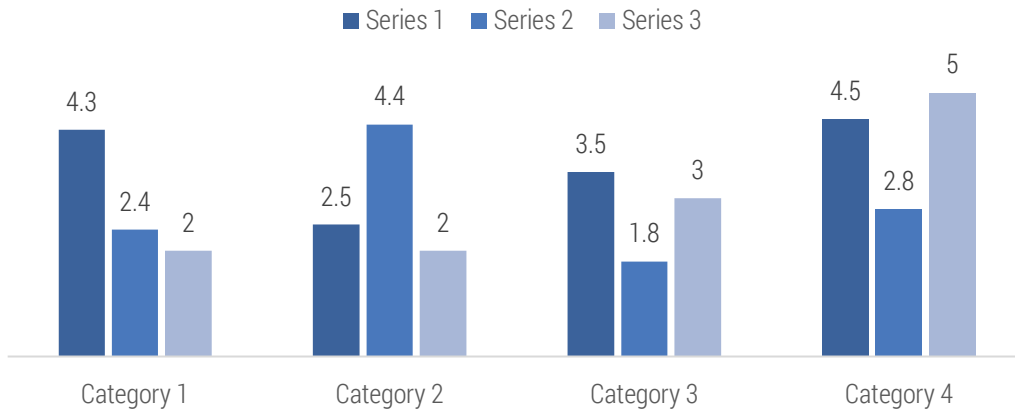
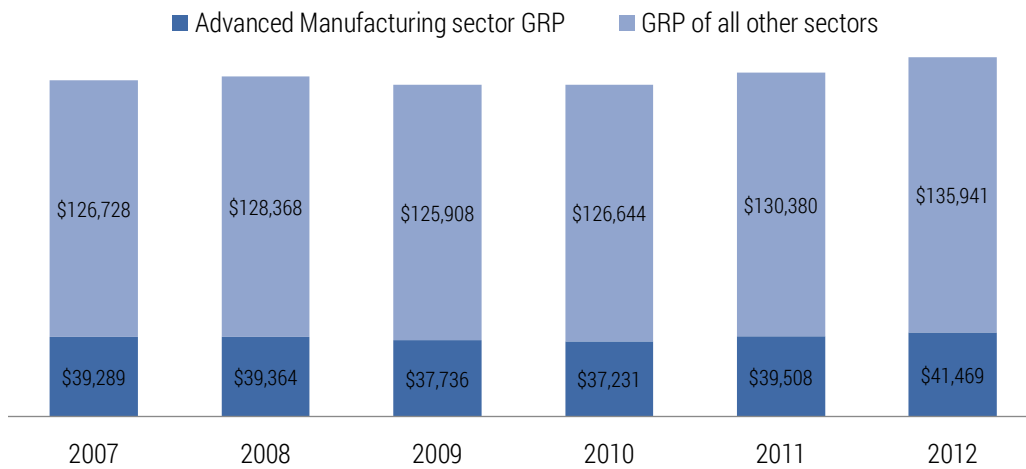


Figure 2: Stacked Column Chart



Bar Chart

- Solid colors, unless showing future projections
 - Future projections should use a striped pattern and have an outline around the bar
- 75% gap width between categories
- Legend centered on top of chart
 - Do not need a legend when there is only one data series
- Data labels included on bar when stacked; to the right when not
- No gridlines going through data in the background
- Data should be in order of largest on top to smallest on bottom
 - This is not true when showing data by time (years) or by something that should be listed alphabetically (states) or some other logical order
- Good for using with stacked data
- If still readable, remove x-axis

Figure 3: Bar Chart



Figure 4: Clustered Bar Chart

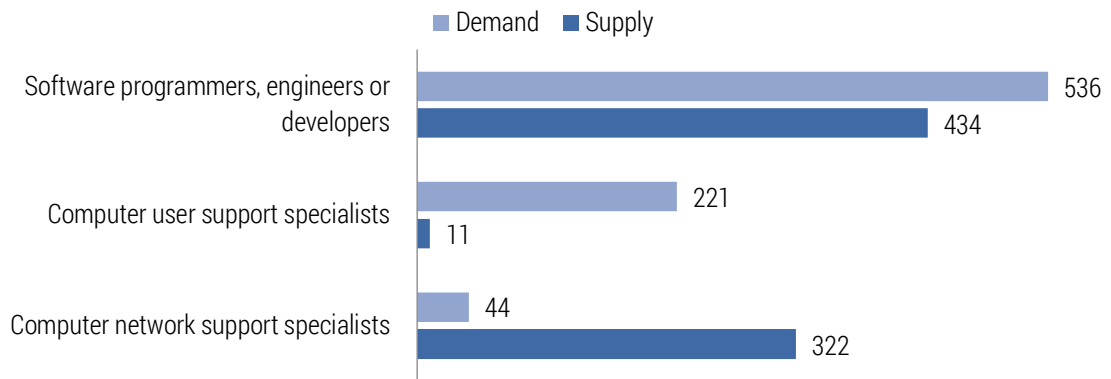
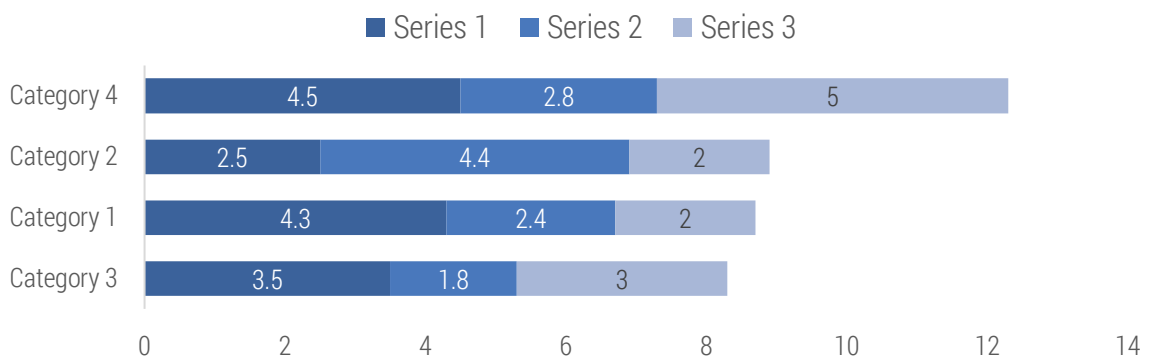


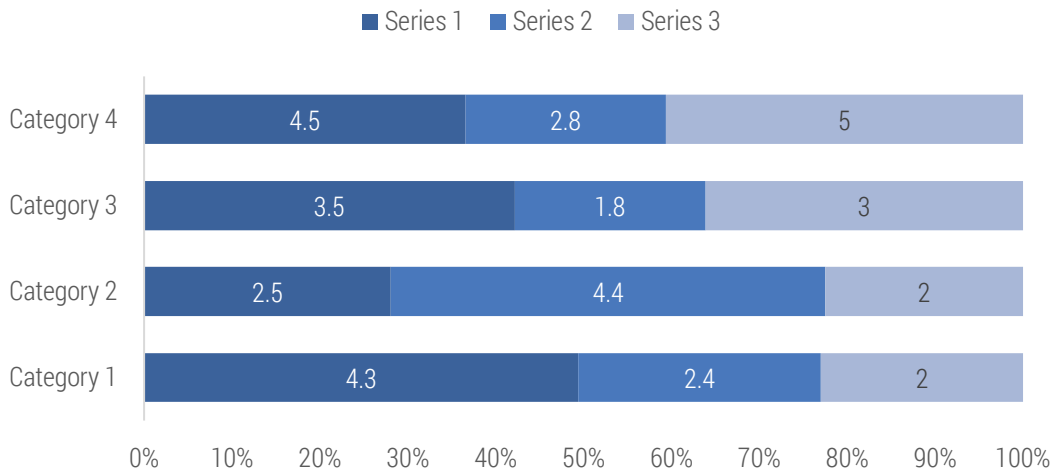
Figure 5: Stacked Bar Chart



100 Percent Bar Chart

- Use when comparing data for different groups or in any situation where you might want to compare pie charts
- Solid colors
- 75% gap width between categories
- Legend centered on top of chart
- Data labels included on bar
- No gridlines going through data in the background
- Data should be sorted by first or last category, largest to smallest or vice versa
 - This is not true when showing data by time (years) or by something that should be listed alphabetically (states) or some other logical order

Figure 6: 100 Percent Bar Chart



Line Chart

- Don't include all data labels if more than 4 categories
 - Label beginning, end, high and low if cluttered; use your discretion
 - Add a diamond-shaped marker for any points that are labeled
- Labeling to the right of each line is preferable to a legend
 - If the lines are too close together for this method to be clear, place legend on top or to the right
 - Make sure order of legend corresponds to order of lines on the far right of the graph
- If more than four series, probably don't use a line chart
 - With 4 or more data series, an array of individual charts can display a pattern and may allow for better comparison
- Lines should be solid unless showing future projections (then dash)

Figure 7: Line Chart

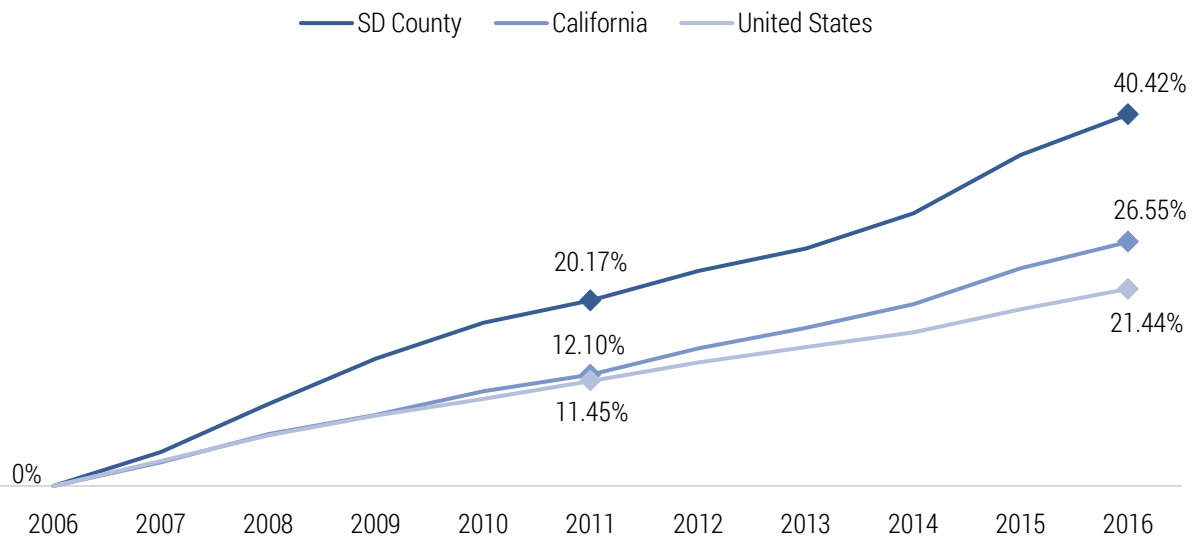
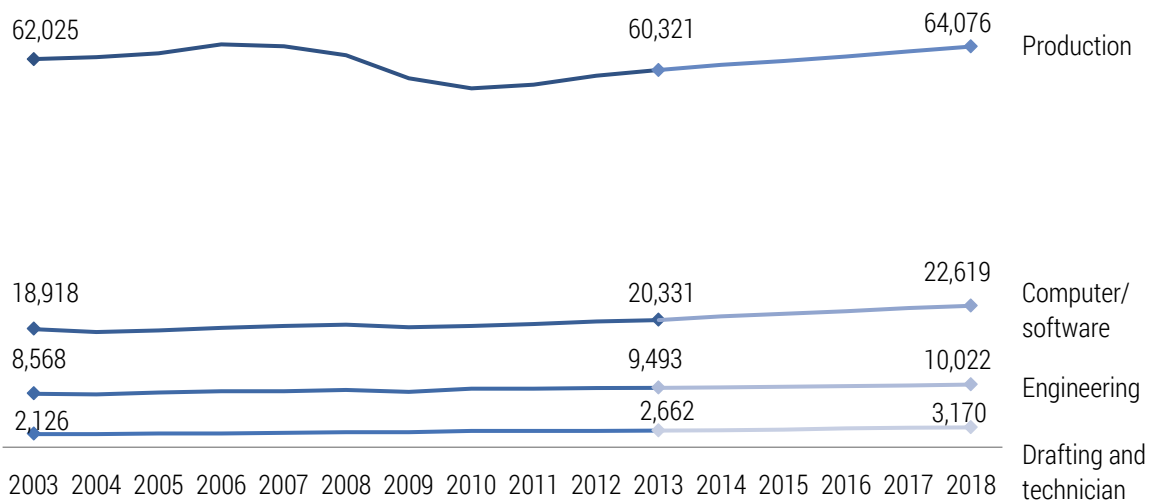


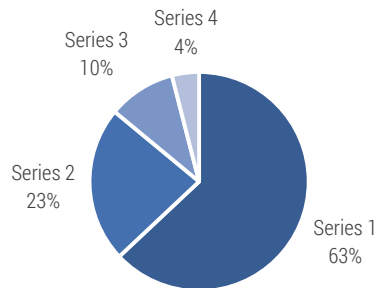
Figure 8: Line chart with projections



Pie Chart

- Use **sparingly** (avoid if possible—doesn't represent most data well)
- Solid colors
- When showing data in discrete categories (e.g., types of cars), use multi-colored schemes
- When showing data that is continuous (e.g., age), use monochromatic color schemes (i.e., varying shades of blue)
- Include a white, thin "outline" between each pie slice
- Largest data point should start at the 12 o'clock position and go to the right
- Don't compare pie charts (use 100% bar chart instead)
- Have no more than 5 categories
- Do not use a legend
- Data labels included outside the chart (not inside)
 - Data labels should include the category name and on a new line, the data point.

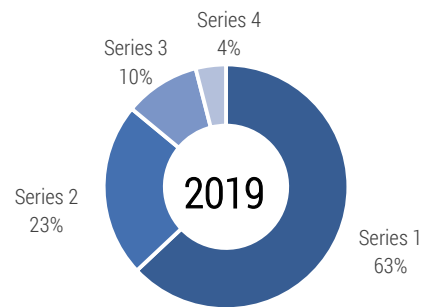
Figure 9: Pie Chart



Donut Chart

- In most cases, use this instead of a pie chart
- Solid colors
- Data labels included outside the chart (not inside)
 - Data labels should include the category name and on a new line, the data point
- When showing data in discrete categories (e.g., types of cars), use multi-colored color schemes (see here)
- When showing data that is continuous (e.g., age), use monochromatic color schemes (see next slide)
- Include a white, thin “outline” between each of the donut slices
- Use **sparingly**
- Use space in the middle for additional information (e.g., year)

Figure 10: Donut Chart



Tables

Tables should be centered on the page with titles centered above. Titles should be Arial, Bold, 10pt, centered with one space before the table (use style “chart/figure title”).

When a column contains numbers, they and their column titles should be right-aligned. This lines up commas and allows for easier visual comparison. Text columns and their titles should be left-aligned. Notice that the numbers in Table 3 are left aligned. This is because these codes are used like text rather than numbers (i.e., you wouldn’t perform any calculations on them).

Column Titles: Use white Arial, 10pt font, and fill the cells with the main report color. All titles should be vertically aligned at the bottom of the cell, and horizontally either left or right depending on the column contents. Right click on the desired cells and select “cell alignment” to adjust this.

Table Content: Use black Arial, 10pt font. Use white fill whenever possible. If a table has many rows and columns, it may be difficult to read without alternate shading in rows. To add shading, select the table and click on the “table design” tab on the toolbar. Select the style called “Workforce Partnership Report.” For some reason the style insists on making the first column and row bold—remove this bolding and fix any alignment that is messed up by applying the style.

In general, use whitespace strategically to improve readability of tables. Make row heights a little bigger (all examples), leave space between distinct categories (table 4), and leave space between lists of numbers and their totals (table 1).

Table 1: Example with Numbers and Totals

Description	2013 Jobs	2018 Jobs	Change (Job Growth)	Replacement Jobs	Openings (Job Growth + Replacement Jobs)
Production	86,867	89,823	2,956	10,809	13,765
Engineering	11,580	12,453	873	1,607	2,480
Computer/software	21,797	24,186	2,389	1,616	4,005
Drafting and technician	5,232	6,008	776	674	1,450
Total	125,476	132,470	6,994	14,706	21,700

Table 2: Just Single Lines of Text

SOC	Description
11-9021	Construction Managers
13-1199	Business Operations Specialists, All Other (Energy Auditors)
17-2199	Engineers, All Other (Photovoltaic designers)
41-4010	Sales Representatives
47-2111	Electricians
47-2152	Plumbers, Pipefitters and Steamfitters
47-2231	Solar Photovoltaic Installers
47-4099	Construction and Related Workers, All Other (Weatherization Specialists)
49-9021	Heating, Air Conditioning, and Refrigeration Mechanics and Installers

Table 3: Long List of Numbers Without Totals

Occupation	# Programs	# Institutions	# Program Completions
Construction or project managers	15	9	42
HVAC technicians	13	6	381
Electricians	13	3	456
Photovoltaic installers	9	5	63
Sales representatives	9	5	53
Plumbers	9	3	360
Energy auditors	5	3	0
Photovoltaic designers	4	2	63
Solar water heater installers	0	0	0
Documentation specialists	0	0	0
Weatherization specialists	0	0	0

Table 4: Multiple Lines of Text in Each Row

Occupation	Skill Sets
Mechanical Drafters	CAD AutoCAD Mechanical design Mechanical engineering CAD Design
Engineering Technicians, Except Drafters	Software engineering Systems engineering JAVA C++ LINUX
Mechanical Engineering Technicians	Repair Hand tools Schematic diagrams Soldering Wiring diagrams
Electro-Mechanical Technicians	Repair Soldering Inspection Schematic diagrams Oscilloscopes

APPENDIX A

Appendices follow the same guidelines that are followed elsewhere in the report. They should be organized in order of appearance in the report.



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We provide equal opportunity for our programs, services and employment. Auxiliary aids and services for individuals with disabilities are available upon request.

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