Guidelines on How to Structure & Format
URBP 298 Planning Reports

A. REPORT STRUCTURE

Note: There are only a few hard-and-fast rules about how to structure reports, but your Planning Report should generally follow the plan laid out below. If you wish to add additional sections, or subtract some of the sections listed below, feel free to consult with your adviser.

Cover: You can design the “cover” yourself. However, you should include the full title, your name (i.e., the author’s name), and the publication date (i.e., December 2016). If you do not wish to design a separate cover, then use the title page (described next) as the report cover.

Title Page (required): This page must use the content and formatting shown on the last page of this handout.

[The material from here to the “body” of the report is called the “front matter” of the report]

Acknowledgments (required): You can use this page to thank people who have helped you with your Planning Report.

Table of Contents (required): Include in the table of contents every chapter and other section listed in bold below (List of Tables, Appendix A, etc.). Note that MS Word will automatically create a table of contents for you, but only if you systematically apply “styles” to all of your Planning Report headings. For guidance, search Word's Help function for “table of contents” as well as “apply, change, create, or delete a style." For other tips on using Word’s formatting functions, see section C of this handout.

List of Tables (required): List each table title and the page that the table appears on. Note: If you use MS Word’s “caption” function to add titles to all your tables, then Word can automatically generate a list of tables. For guidance, search the Help function for “insert table of figures." Once you open the dialog box to insert this, you’ll need to change the “caption label” from “figure” to “table.” For other tips on using Word’s formatting functions, see section C of this handout.

List of Figures (required): List each figure title and the page that the figure appears on. Note: If you use MS Word’s “caption” function to add titles to all your figures, then Word can automatically generate a list of figures. For guidance, search the Help function for “insert table of figures.” For other tips on using Word’s formatting functions, see section C of this handout.

Last update: 8/18/2017
Executive Summary (required): Write a summary of your report. For a report the length of a typical 298 Planning Report, an executive summary would likely be 2 or 3 pages. It’s fine to repeat in the executive summary some text used in the body of the report.

Chapter 1: Introduction: Your report really begins with the first chapter, which is often (though not necessarily) titled “Introduction.” End the chapter with a paragraph that provides an overview of the content of the remaining chapters in the report. Even if you include an executive summary, do not assume that readers will start by reading that section. Chapter 1 needs to function as a true introduction to the report, rather than to start where the executive summary left off.

Chapter 2: Title Here: Continue on with the rest of your chapters. To help your reader navigate your Planning Report, you may wish to conclude each chapter with a brief summary of the key points covered in the chapter as well as a clear linkage to the material in the following chapter.

Appendix A: Appendix Title Goes Here (optional): If you wish, you can create one or more appendices to the report. These are often given a letter rather than a number. For example, “Appendix A: Survey Questionnaire,” “Appendix B: Raw Survey Results,” and so on. Each appendix should have a title as well as a letter.

Bibliography (required): Include in the bibliography only items cited in your report.

B. REPORT FORMAT GUIDELINES

You may design most elements of the report layout yourself, in consultation with your adviser. However, follow the guidelines below unless you first get permission from your adviser to do something different.

It is strongly recommended that you prepare your report to be an “accessible” document. An accessible document is an electronic document that can be read by everyone, including people who use screen readers. Some information pertaining to creating accessible documents is provided below. If you would like more detailed information, you’ll find additional materials at these links: www.hhs.gov/web/section-508/making-files-accessible/checklist/word/index.html#, www.sjsu.edu/cfd/docs/accessible_word_2008.pdf, and www.sjsu.edu/cfd/teaching-
1. Pagination

- The front matter of the report should be paginated with lower-case roman numerals (i, ii, iii, etc.). The cover and title page, since these are not considered “front matter,” have no page numbers. The rest of the report should be paginated with Arabic numerals (1, 2, 3, etc.).

2. Numbering chapter sub-sections

- It is recommended (although not required) that you include the chapter number when numbering subsections. For example:

  1: Introduction to the Report
  1.a. Study Methodology
  1.b. Overview of the Report

- Do not include a level of sub-headings if you have only one item listed. (In other words, you don’t need a “1.a.” heading unless you have a point “1.b.” that follows it.)

3. Figure design

- The term “figure” refers to maps, photographs, diagrams, or other types of pictures. Every figure should be labeled with the word “Figure” plus a number and title. For example:

  Figure 1: Map of Study Location.

  Note that MS Word can automatically add numbered titles to figures and tables. For guidance, search the Help function for “insert caption.” For other tips on using Word’s formatting functions, see section D of this handout.

- Figure titles (or what MS Word calls “captions”) can be read by a screen reader. However, to provide clarity for individuals who are visually impaired, it is best to include “alternative text.” Alternative text is invisible but will be read by the screen reader. To add alternative text, right-click your image, graphic, or text box, and then select “Format Picture.” Then, click on “Alt Text” and enter a brief title and a detailed message describing the content of the figure.

- For every figure, note the source, formatted as if you were writing a footnote. The only possible exception to this rule is if you have a very large number of similar figures that are all your own work (e.g., maps you created or photos you took). If you think this case might apply to your report, consult with your adviser.
The source information goes directly with the figure, either right below or directly after the title. Do not put the source information in a footnote at the bottom of the page. The example below shows a properly formatted figure source (from MUP student Cecilia Lavelle Conley’s Planning Report).

Figure 1: Bay Area Bike Share Bicycles. Source: Bay Area Bike Share, “Bay Area Bike Share,” http://www.bayareabikeshare.com (accessed April 5, 2015).

- The figure number, title, and source information, all go outside the figure, not embedded within, so that all figures have a consistent style and placement of this information. Make sure that you don’t have figure titles and/or source information in two places, both embedded in a figure and also above or below the figure.

- Avoid using teeny, tiny fonts within the figure that many people will need glasses to read!

- Make sure the figure is of a high resolution. Resolution can be a problem when copying a figure from another document. If a figure you want to reproduce is impossible to copy at a high resolution, you may need to look for a different version of the same information that is higher resolution or to create your own version of the figure.

4. Maps

- Maps included in your report are labeled and numbered as “figures.”
Be sure to follow all instructions in item 3, above!

If you create your own maps with Esri software and find that the map is blurry when you paste it into the report, then here are some instructions that should help:

1. In ArcMap, be sure that the map is finalized in the layout view (e.g. clear title, scale bar, north arrow, clear legend, clear labels, your name and date, etc.) and be sure to save your map.

2. In ArcMap’s File menu, click Export Map. In the dialog that appears you can choose from a variety of image formats. It is recommended that you choose either JPG or TIF – both are common image formats that essentially ‘take a picture’ of your map without changing it. (Note: exporting to PDF is not recommended since ArcMap often converts map symbols such as north arrows and highway number shields into “fonts”, which results in an unwelcomed change to your lovely map).

3. In the Export Map dialog box, after you have selected your choice of export formats, click the “Options” button. Under “dpi” (dots per inch) choose 200. This will ensure a nice, crisp image when you export your map without creating an excessively large file size.

4. In the Export Map dialog box, be sure to check the output file path where your image will be saved so that you can be sure to find it once the export process is finished.

If you have created a map by altering someone else’s map (such as annotating a Google map), here is a recommended way to write the source citation:

Source: Author’s annotations of map from [write out source citation here].

Here is a sample format¹ to use when citing data retrieved from a database like Google Maps or Google Earth:


Follow the accessibility guidelines provided for figures (above) to ensure your maps can be

---

¹ This format is Asha W. Agrawal’s creation, made by blending Turabian’s style for websites (8th edition) with the format for “Searches in Online Library Catalogs and Databases” explained in Maurice Crouse’s webpage “Citing Electronic Information in History Papers,” May 8, 2013, accessed August 9, 2016, http://www.ce.memphis.edu/3137/Documents/Citing%20Online%20References.htm.
undertstood by visually impaired readers.

5. Tables

- You will need to create a specific design style for tables in your report and use that same style for all tables, making modifications to your style only when necessary (e.g., to fit data that won’t work in your standard style).

- You can create your own table design style, if you wish. However, the style described in Chapter 26 of Turabian (8th edition) is strongly recommended, as it is widely used and provides a clean, professional look. Page 362 provides samples of what the tables look like, and the chapter explains in detail the design rules to follow. One advantage of following the Turabian style is that someone else has already thought through and written out all the design rules (where to place the source information, how to use cell borders, etc.). Therefore, you can simply apply rules, instead of having to first create your own set of rules before applying them.

- To make your tables accessible, use MS Word’s table function to create a table, instead of building the table yourself using tabs, spaces, etc. Also, do not use “enter” keys to create rows within a table cell or use tab keys to create columns within a table cell. Finally, if the table extends across more than one page, it is important to repeat header row information on each page the table appears.

- For every table, note the source, formatted in Turabian’s footnote style. The only possible exception to this rule is if you have a very large number of similar tables that all present your own original data (i.e., the results of a survey you conducted). If you think this case might apply to your report, consult with your adviser.

The source information goes directly below the table. Do not put the source information in a footnote at the bottom of the page. Below is an example of a properly formatted table source citation (from MUP student Ryan Driscoll’s Planning Report)

<table>
<thead>
<tr>
<th>Table 1. Example Development Potential Analysis</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parcel</td>
</tr>
<tr>
<td>--------</td>
</tr>
<tr>
<td>A</td>
</tr>
<tr>
<td>B</td>
</tr>
<tr>
<td>C</td>
</tr>
<tr>
<td>D</td>
</tr>
<tr>
<td>E</td>
</tr>
</tbody>
</table>

Source: Author’s data; methodology adapted from Jennifer L. Rosenberg and Ann-Margaret Esnard, “Applying a

1 Average size of vacant lots along corridor.

- If you wish to include a table someone else created, it’s perfectly fine to do that. Remember that you can also take the data from someone else’s table and put it into your own table design. If you do this, here’s a suggested way to word your source citation:

  Source: Data from [data source citation follows].
C. TIPS FOR USING FORMATTING TOOLS IN MICROSOFT WORD

Note: the steps below are for Word for Mac (2011) but similar functions exist in all versions of Word, whether Mac or PC. For questions about this appendix, please contact Rick Kos.
Report Title

Table of Contents

Chapter One
Subsection in chapter 1
Subsection in chapter 2
Chapter Two
Subsection in chapter 2
Subsection in chapter 3
Subsection in chapter 3
Chapter Three
Subsection in chapter 3

Table of Tables

Table 1 Descriptive Title For Table

<table>
<thead>
<tr>
<th>Variable</th>
<th>Column heading 1</th>
<th>Column heading 2</th>
<th>Column heading 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Caption for Tables:

- Select entire table
- View menu > print layout
- Insert menu > Caption

Caption: Table 1 (Add)
Label: Table
Position: Above

Reference Type: Table
Insert reference to: Only label
[Insert as hyperlink (Jumping within document)]
Chapter Two ⑧ Styles > Heading 1

Subsection in chapter 2 ⑨ Styles > Heading 2

Subsection in chapter 2 ⑩ Styles > Heading 2


Figure 1 Description Of Figure

Chapter Three ⑪ Styles > Heading 1

Subsection in chapter 3 ⑫ Styles > Heading 2

Subsection in chapter 3 ⑬ Styles > Heading 2

Go back to previous page for step 15
YOUR TITLE HERE

A Planning Report
Presented to
The Faculty of the Department of
Urban and Regional Planning
San José State University

In Partial Fulfillment
Of the Requirements for the Degree
Master of Urban Planning

By
Jean N. Doe

December 2017