

*the Cutting Edge Guide to*

*planning*  
*writing*

**PUBLICATIONS**

*&*  
*producing*

*for the Real World*





*You're busy, so this guide is short.*

*The Cutting Edge Guide to Planning, Writing, and Producing Publications for the Real World*



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Special thanks to Daryl Kimball and Eric Schaeffer for their help and advice.

As we ricochet from artificial intelligence to fake news, getting the facts out has rarely seemed like a higher calling. Whether you write to change minds, raise funds, or stir citizens to action, your chances depend in part on how well you put one word in front of another and what shape those words take on the printed or virtual page.

Why do designers care how you plan and write your publications? The success of our work depends in part on the effort you put in before we enter the process. As visual options proliferate, we need to coordinate more closely with you to ensure our design clarifies and amplifies your message.

Somewhere in your organization may dwell a wizard who can write copy with a flourish, check digital proofs with a gimlet eye, and find high-resolution images that melt the heart. That person may even be you. But in the rough and tumble of life, many people learn simply by diving in and doing. We hope this guide will save you trouble, time, and money by mapping out the steps to a great publication.



# Plan.

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## ESTABLISH AN IDENTITY.

To be effective, every organization must find itself. The word “brand” gets bandied about so much that it’s worth looking beneath its surface to ask the underlying questions: What is your organization’s fundamental purpose? Its audience? Its goals and strategies?

Although your board may settle much of this high and mighty stuff, the staff usually sets the tone of an organization’s work. That tone should flow from your driving principles and captivate those you seek to reach. A grassroots organization may strive for authority, a campus group may strike an edgier pose, and scientists may opt for dry but accessible precision.

Consistent use of color, type, and logo can make your organization easily recognizable. Keep your brand guidelines nimble, since your audience and purpose may shift from one project to the next. For each publication, determine whether it fits a format you already have or whether it warrants a new design.



*Every organization must find itself.*

## BUDGET & SCHEDULE.

The three variables of publications planning—speed, complexity, and cost—are inexorably linked. Remember that when you increase the complexity of a piece, you may slow the schedule and increase the price. When you tighten the turn-around time, you risk rush charges and may need to simplify.



If you have a non-negotiable release date, contact your designer (and printer, if applicable) before you begin. If you have a tight budget, ditto. If you want to try something totally new and aren't sure how to go about it, ditto times three.

**TIMELINES.** Working backward from your release date, include mailing and printing time, if those apply, then design, your in-house approval process, editing, writing, and research. Account for upcoming holidays and determine whose scheduling is based on particular windows of availability.



**BIDS.** Most contractors can provide two types of estimates: a loose budget figure if you need a ballpark price in advance and a tighter estimate once you have a firm idea of the project. Ask how long the bid remains in effect and what might alter the price. Share any cost constraints you have.

**CHANGES.** Everyone's estimates of time, money, and capacity are premised on your description of your piece. Alter your publication, and all bets are off. Try to anticipate any big changes, since with fair warning, vendors can try to minimize the damage to your schedule and bill. **SEE "READ, REVISE, AND LET GO" ON PAGE 11 AND "UNDERSTAND THE IMPACT OF CHANGES" ON PAGE 16.**



*Alter your publication, and all bets are off.*

# Write.

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## DEFINE YOUR AUDIENCE.

No matter who your audience, they benefit when you pause to imagine them before you sit down at the keyboard, whiteboard, or yellow pad. Are they policymakers, funders, or activists; professionals, volunteers, or people who've never given the topic a thought? Always ask:

**WHAT DO THEY KNOW?** Put background information in a clearly labeled section the experts can skim or skip. For novices, define any special terms early in the text or in a **glossary**. If you're introducing a wholly new concept (congratulations!), consider an infographic that breaks it into components and shows how the parts fit together.

**WHAT SHOULD THEY LEARN?** Feed your readers a healthy diet of clear ideas and firm facts. If you can't provide a crucial piece of information, explain why. Format your piece so readers can easily revisit key points.

**HOW CAPTIVE ARE THEY?** A doubting or distracted reader may need colorful prose, pullouts, and infographics, whereas the die-hard wonk will sniff out nuances down to the final footnote. But don't count on holding anyone's attention for long. Put all your best ideas up front in an **overview** or **executive summary**, and as you write or edit, flag any points best conveyed visually.

**Keep in mind the paradox of our information age: By appealing to the reader with *no* time, you increase the chance that your reader will *make* time to read most, or even all, of what you have to say.**

## STRUCTURE YOUR ARGUMENT.

Now that you know your audience, plot a strategy to win them over. Define the problem, propose a solution, and explain why it's best. Use headings and topic sentences to guide them through your logic. Prose, unlike underwear, often works best with all its structure showing.

Either while you write or as you edit, attend to these basics:

**OUTLINES** bring clarity to your prose like nothing else. If great instincts or years of practice enable you to craft crystalline prose without explicit planning, consider making an outline from your draft. Think of it as a safety inspection.

**LEVELS OF HEADINGS.** As you write, use well-delineated styles for each level of heading you employ. Convention dictates starting with the top-level heading in every chapter or section and moving through the options in a consistent order.

**FORMATTING.** Creating text boxes in your draft is optional; it's fine to mark that text with “[begin box]” and “[end box].” Don't employ multiple spaces, returns, or tabs to line things up; your designer can handle that. Hit return (a hard, not soft, one) after every paragraph. When creating tables, devote one cell to each item or unit of meaning.

**FOOTNOTES, ENDNOTES, AND SOURCES.** Readers who question your assertions will need footnotes so they can check your sources as they read. Everyone else will follow the argument better on the cleaner, quieter pages endnotes afford.\* List sources directly under charts and graphs. Avoid cluttering your headings with citations; where possible, place footnote or endnote numbers in the text instead.

\* Add an asterisk for any small exception (usually an aside) that you prefer to place at the bottom of the page.



## SAY IT SIMPLY.

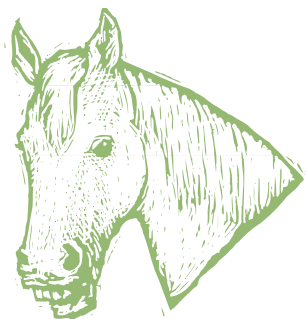
For all his lacy oratory, even Shakespeare fell back on simple Anglo-Saxon words when push came to shove. These tips will help you keep your prose clean, if not more poetic:

**USE THE SHORTEST, MOST PRECISE PHRASING.** Stubby words stick in a reader's mind. James Baldwin distilled the issue of inequality down to eight words: "If I am starving, you are in danger."

**STICK CLOSE TO THE ORIGINAL FORM OF A WORD.** As "perform" becomes "performance" and then "performative," the reader may tune out and fail to note you said the emperor's naked. Consider alternatives like "empty" or "sham."

**USE STRONG, ACTIVE VERBS** and precise subjects. Don't let the agents of change wiggle out of your sentences. If the administration slashed funds for public housing, you let them off the hook by reporting, "Funds for public housing were cut." Beware of vague words, especially "impact," which fails to convey what kind of change occurred.

**QUESTION EVERY MODIFIER.** Ensure that each adjective or adverb adds precision. Use too many modifiers and you may cloud your point, diluting the impact of your nouns and verbs.



*Mr. Ed made a career out  
of pithy one-liners.  
If a talking horse on TV  
can do it, you can, too.*

**VARY YOUR STRUCTURE.** When the concepts you're explaining grow complex, take extra care to state them plainly. Use noun-verb-object constructions and limit your use of dependent clauses. Simplicity shouldn't limit you to sameness. Vary the length and rhythm of your sentences, giving the reader a short, easy statement as a respite after a longer, complex one. Likewise, provide relief with a short paragraph after a long one, but keep most paragraphs brief.

**MAKE NUMBERS MEANINGFUL.** When you add a fourth figure to a paragraph, it's time to consider a table or graph. Whenever you include statistics, give your readers enough information to put the numbers in perspective. (Does a 40% reduction in carjackings mean a drop to 200 or to 12?) Keep charts and tables self-explanatory whenever possible.

**AVOID CLICHÉS.** Everyone who used to think outside the box is now so impactfully interrogating various spaces, it's reaching fever pitch. Yuck! Try fresh images or plainer words.

**WRITE INCLUSIVELY.** When writing about groups defined by race, ethnicity, sexual orientation, etc., respect the labels they use for themselves. If your subject uses a term that's unusual or controversial, you can use a direct quote to show you're following their lead.

**BORROW AND LEND.** When using boilerplate (stock prose your organization relies on to convey information in a uniform way), remember to clean up after you cut and paste. Make sure the recycled phrases read as part of a seamless text: define acronyms on first appearance, maintain a consistent tone, and smooth the transitions between old prose and new.

**CUT EXTRANEOUS INFORMATION.** Focus on what your reader needs to learn, rather than dumping all your knowledge on them. As one weary editor put it, "Part with the notion that all your research must show."

## WRITE GRAMMATICALLY.

**USE IDENTICAL CONSTRUCTIONS TO UNDERScore CHANGES IN CONTENT.** When you list items in a series or in bulleted points, make them all verb phrases or all noun phrases, not a mix.

**CHECK YOUR ANTECEDENTS.** Use a pronoun (it, she, they, etc.) only when the noun to which it refers is irrefutably apparent. Exercise caution with modifiers; when they drift free of the entity they modify, absurdity may ensue. “Disturbed by air pollution, the governor’s statement called for cleaner vehicles,” is nonsense, because poor air quality disturbs the governor herself, not her prose.

**WATCH YOUR USAGE.** The English language is an ever-changing organism, and the average speaker employs phrases that don’t yet pass muster in print. What to do? For finer points, consult *Dreyer’s English* or *The American Heritage Dictionary*, but master the distinction between such easily confused pairs as affect/effect, that/which, and who/whom.



*Language should evolve with its speakers.*

## KEEP PUNCTUATION AND CAPITALIZATION CONSISTENT AND CORRECT.

- Decide whether to place a **serial comma**, also called an Oxford comma, after the penultimate item in a series, then stick to your choice.
- **Footnote or endnote numbers** go after punctuation marks, not before—except dashes, which they precede.
- **Single quotation marks** suggest an ironic disbelief in the term they enclose (the ‘Peacemaker’ missile, for example).
- The medium-length **en-dash** between two dates indicates a range; it replaces both the “from” and the “to,” turning “from 2010 to 2024” into “2010–2024.”
- The rules for **capitalizing titles** defeat most humans, so look them up. Note that capitalizing “administration,” “congressional,” and titles that appear after a person’s name is stylistically unwarranted and has yet to be proven effective as a lobbying technique.

**USE SPELLCHECK AND GRAMMAR CHECK** but remember they follow well-trod patterns, sometimes flattening your prose and occasionally missing a grave mistake. Confirm the spelling of any proper name that’s beyond your computer’s ken. Whenever a word has two spellings, pick one and stick with it. Adopting a style guide will help you maintain consistency.



*Grammatical errors unsettle your readers.*

## READ, REVISE, AND LET GO.

Writing is usually a process of flailing, fidgeting, honing, and refining. Read your work over and over and over. Read it aloud. Show it to a few friends and an enemy. Your draft may need **substantive editing** to clarify form and content; **copy editing** to repair grammar, punctuation, and spelling; and always final **proofreading** by someone with a fresh eye.

**You can speed and simplify the design process by giving your designer final text that's been approved and proofread. Then plan for one more careful read-through once the layout's complete.**



*Keep your style current.*

**STAY IN STYLE.** Whether your organization uses AP, Chicago, or an academic stylebook, master its basic requirements, including whether abbreviations like “U.S.” take periods, the policy on serial commas, and how to punctuate a bulleted list.

**TRIM TO FIT.** If you’re writing something of a specified length, keep track of the word count as you go, but remember that subheads, bullet points, captions, and pull-quotes may reduce the number of words that fit on each page.

# Produce.

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## WORK WITH YOUR DESIGNER.

Whether you're teaming up with a firm three time zones away or a colleague down the hall, a few steps will make collaboration easier:

**COMMUNICATE CLEARLY.** Start by describing the effect you want your publication to have. (Share samples of your organization's previous publications, as well as any others you admire.)



Choose one person who will communicate with the designer, so you'll avoid wasting time, effort, and money with mixed messages.

**Start by resolving any conflicting goals within your ranks. No designer can magically thread the way between irreconcilable differences.**

**ORGANIZE YOUR MATERIALS.** Name your files logically, include captions for photos, and outline the order of the stories and artwork. If you can't provide everything at once, explain what's missing and when you'll have it. Understand that some work cannot begin until crucial pieces show up, and anything arriving late may disrupt the schedule.

To avoid confusion about versions, name your text files in a way that indicates their finality. **Send the files to your designer directly**, because even the most self-evident shared drive can confound an outsider who must navigate multiple platforms.



# THINK VISUALLY.

**UNDERSTAND GRAPHICS FORMATS.** Graphics come in two flavors: **Raster** images (often photos) are composed of tiny dots called pixels, which blur when enlarged. **Vector** images (usually logos or illustrations) have the capacity to redraw themselves crisply at any size.

## Graphics File Formats at a Glance

FORMAT	BEST USES	PROS [👍] & CONS [👎]
<b>.ai</b> vector	Icons, logos, and diagrams for print or PDF	<ul style="list-style-type: none"> <li>👍 Transparent background</li> <li>👍 Editable in Illustrator</li> <li>👍 Crisp even when enlarged</li> <li>👎 Only visible with specific software</li> </ul>
<b>.eps</b> vector or raster	Icons, logos, and diagrams for print or PDF	<ul style="list-style-type: none"> <li>👍 When created in Illustrator, all the advantages of .ai</li> <li>👎 When created in Photoshop, none the advantages of .ai</li> </ul>
<b>.gif</b> raster	Small graphics for the web	<ul style="list-style-type: none"> <li>👍 Compact; crisp type</li> <li>👍 Can be animated</li> </ul>
<b>.jpg/.jpeg</b> raster	Photos on the web, file storage	<ul style="list-style-type: none"> <li>👍 Extremely compact</li> <li>👎 Loses clarity each time saved</li> </ul>
<b>.pdf</b> vector but may contain raster images	Sharable files, diagrams, proofs, fillable forms	<ul style="list-style-type: none"> <li>👍 Type and diagrams stay crisp even when enlarged</li> <li>👍 Viewable with free software</li> </ul>
<b>.png</b> raster	Icons, logos, and diagrams for MS Office or web	<ul style="list-style-type: none"> <li>👍 Transparent background</li> <li>👎 Blurs when enlarged</li> <li>👎 Not editable in Illustrator</li> </ul>
<b>.svg</b> vector	Icons, logos, and simple diagrams for print, PDF, or web	<ul style="list-style-type: none"> <li>👍 Transparent background</li> <li>👍 Editable in Illustrator</li> <li>👍 Crisp even when enlarged</li> <li>👎 Won't hold complex detail</li> </ul>
<b>.tif/.tiff</b> raster	Photos edited for printing	<ul style="list-style-type: none"> <li>👍 Never loses clarity when saved</li> <li>👎 Larger file size than .jpg</li> </ul>

**BIGGER PHOTO FILES ARE BETTER.** By providing the largest available version of your images, you give your designer the flexibility to use them at any size or crop them to focus on a small detail.

Image dimensions are measured in pixels per inch (ppi) or dots per inch (dpi). The two are interchangeable. Commercial printing requires 300 dpi, a PDF that prints on an office printer requires 150–200, but a photo on the web will look great at a mere 72.

### Minimum Size for Photos

SIZE	PDF-ONLY	COMMERCIAL PRINTING
8.5 x 11"	1700 x 2200 pixels	2550 x 3300 pixels
8.5 x 5.5"	1700 x 1100 pixels	2550 x 1650 pixels
4.25 x 5.5"	850 x 1100 pixels	1275 x 1650 pixels
1.5 x 2"	300 x 400 pixels	450 x 600 pixels

**RESPECT IMAGE RIGHTS.** Although copyright laws allow you to quote short passages of another author’s words, they don’t allow the “quoting” of images. You must determine whether you need permission to use each illustration, chart, photograph, or icon that you or your designer didn’t create; this will depend on where you found it.

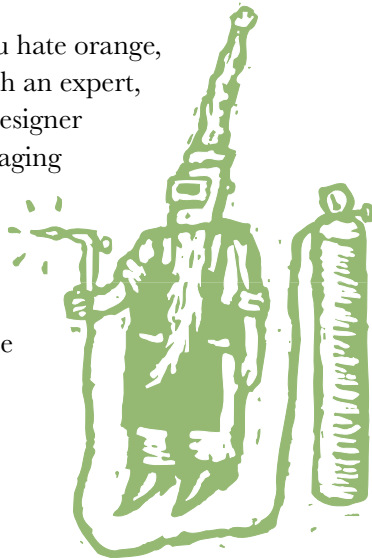
- **Public domain.** Many federal agencies have Flickr sites of photographs, but always read the fine print to confirm that the



image you want is copyright-free. Creative Commons licenses, prevalent on Wikipedia and beyond, come with stipulations as to whether you may alter the image and your obligation to credit the source.

- **Other institutions.** Organizations with a similar purpose will often share their images, but always get their explicit OK. Ask for the largest file size they have and find out whom to credit.
- **Stock imagery** is readily available for fees that range from a few dollars to several hundred. Read the fine print on the license. **Royalty-free** imagery can be used as many times as you like. **Rights-managed** images are licensed for one-time use. **Editorial images** may be used in news stories but not for fundraising, publicity, or advocacy.
- **Commissioned images** are photographs or illustrations you hire someone to produce, negotiating the terms to suit the needs of your organization and the creator.

**LET YOUR DESIGNER CREATE.** If you hate orange, say so. Since you've decided to work with an expert, however, use that expertise. Give your designer leeway to create without you micromanaging details like the exact type size and the placement of each graphic element. If you see a problem, call attention to it immediately. Share any solutions that occur to you, but allow your designer the flexibility to find some other fix.



**CHECK THE PROOFS.** Your designer will show you several stages of work as your publication takes shape. Early PDFs will give you a basic sense of the layout, type, and colors. Tighter versions will follow. **Final proofs** convey how your publication will really look. Include all reviewers as soon in the process as possible. It's simpler, cheaper, and less frustrating to correct a problem early on.

**You're responsible for everything on a proof. Examine text, photos, captions, and illustrations with pathological care, asking about anything you don't understand.**

## **UNDERSTAND THE IMPACT OF CHANGES.**

In the world of shared drives and autosave, eleventh-hour changes may seem like a basic human right. But page design software freezes your words the instant you hand over your file. What design software adds in nuanced spacing, hyphenation, and the interplay of photos, text, and footnotes, it sacrifices in its ability to accommodate changes—each of which must be entered individually.

Consider what your project and budget will bear. A wrong digit or word can be fixed with relative ease, but when you make more extensive changes, you may need to delete as much text as you add in order to keep columns balanced or prevent footnotes from blundering onto the next page.

**Every change, no matter how small, complicates the process and has the potential to upset other aspects of the design, so run a quick cost-benefit analysis before you revise yet again.**

## Ways to Convey Changes

FORMAT	STRENGTHS	TIPS
PDF	Usually best, because it allows the designer to copy and paste your changes into the publication.	Master the comment tools. Each markup (highlighting, striking out, or inserting) generates a box where you can record your change and provide instructions all in one spot.
Word file	Tracked changes work well if you're providing whole new paragraphs or sections.	Each altered section may require formatting afresh.
Email comments	Perfect for a small number of changes.	Refer to the pages using the numbers that appear on the designed page, which don't always match the ones in your viewer window.

## PUBLISH.

**TO PRINT OR NOT TO PRINT?** How you circulate your publication depends on your budget and readership. An electronic PDF is easily shared. A printed document makes a bigger splash at an event and can prompt deeper, more contemplative reading.

**KINDS OF PRINTING.** If you print, the options are short-run **digital printing** (imagine photocopying technology but with higher quality and professional binding) or **offset printing**, a super-crisp technique better suited to larger print runs.

**KINDS OF PROOFS.** As a first step, the printer will show you either a **digital** or a **physical proof**. Approving a digital proof is faster, but a physical proof may give you a better sense of how the final product will look and feel. (The physical proof of a digital printing job is essentially the first copy.) Check the proof within 24 hours of receiving it—or notify the printer if you can't. Examine each page to

make sure every element looks right. Make only necessary changes, understanding that every change takes time and risks increasing the price and throwing off the schedule.

**KINDS OF PDFS.** Adobe's Portable Document Format has so many uses, it's easy to confuse them. A quick review:

- **Low-resolution** PDFs are compact and easily shared by email and on the web. Their images look great on screen but will blur when printed on a commercial press.
- **High-resolution** or print-ready PDFs contain all the information commercial printers need. They may contain **bleeds** (a band of ink beyond the page that ensures edge-to-edge printing) and perhaps **crop marks** that show the bindery where to trim the paper.
- **Interactive** PDFs may contain hyperlinks, audio and visual elements, clickable buttons, and fillable forms. Because they're meant to be shared in digital form, these are often low-resolution.

## GET THE WORD OUT.



Now that you've completed your publication, share it on social media platforms and promote it in newsletters and email blasts. If your findings are novel and your expertise a hot commodity, gather your experts for a press conference or webinar.



# Learn more.

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## WRITING

***The American Heritage Dictionary*** provides the expected definitions but also queries a panel of experts on the stickier wickets of usage. A sense of humor occasionally peeks through.

***The Associated Press Stylebook*** is your best bud if your organization plays by AP rules. Subscribe online for the latest guidelines and an electronic newsletter that covers hot topics.



Although the printed version is thick, hard to navigate, and neon yellowy-green to boot, ***The Chicago Manual of Style*** is available—and as exhaustive as ever—online.

In ***Dreyer's English***, Benjamin Dreyer takes a get-real approach to style and clarity. In a similar vein, Vampire Weekend's song "**Oxford Comma**" may help you blow off steam.

George Orwell's essay "**Politics and the English Language**" offers timeless advice on how to make ordinary prose sing and, as a model of succinctness, includes a 90-word set of six key tips.

Wish you'd taken a writing course? Diana Hacker and Nancy Sommers's ***A Writer's Reference*** can be had as an eBook, in loose-leaf pages, or comb-bound like a community cookbook, because Hacker was hellbent on making it easy to navigate. All formats provide the same sound advice for every stage of writing, gleaned from the authors' decades in the classroom.

## PRINTING

Many printing sales reps will happily arrange a **plant tour** so you can see how the ink actually hits the page.

Find a second-hand copy of the 21st and final edition of International Paper's ***Pocket Pal***, a compact classic that demystifies printing, paper sizes, design terms, and more.

## READ GREAT WRITING.

The best way to improve your own writing is to read and savor the work of the pros. Pay attention to what great writers say, but also to how they craft sentences, construct arguments, elicit sympathy, and convey complex ideas. Try reading across genres—poetry, plays, essays, op-eds, speeches, letters, fiction, and nonfiction—on topics both familiar and new.

If you haven't spent time with classic writers, give them a whirl. We're partial to James Baldwin, Elizabeth Bishop, Rachel Carson, Toni Morrison, Jawaharlal Nehru, William Shakespeare, and Virginia Woolf, but half the fun is composing a list of your own.



## CUTTING EDGE DESIGN, INC.

**We're a women-owned shop** located in the Dupont Circle neighborhood of Washington, D.C.\* Since 1987, our design, editing, and publications planning have helped countless organizations and small businesses that strive to make our world a better place. We're small enough that every client is a major one but large enough to invest our designs with the richness of multiple points of view.

**We create reports, brochures, issue briefs, annual reports, logos, infographics, presentations, and more.** Our practical approach enables us to work quickly and creatively within a budget in a way that's consistent, eye-catching, and effective.

**Learn more about our work** and download a digital version of this guide at **CuttingEdgeDC.com** or contact us directly at **info@cuttingedgedc.com**

\* Once the District achieves statehood, D.C. will stand for Douglass Commonwealth. If you have congressional representatives, ask them to help make this happen.

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