

chicago manual of style capitalization rules for editors

chicago manual of style capitalization rules for editors are a cornerstone of professional editing, ensuring clarity, consistency, and adherence to established conventions. Mastering these guidelines is essential for any editor aiming to produce polished and authoritative work. This comprehensive article delves deep into the intricacies of Chicago Manual of Style (CMOS) capitalization, offering detailed explanations and practical advice for editors. We will explore general principles, specific categories like proper nouns, titles, and headings, and common pitfalls to avoid. Understanding these rules is not merely about following a style guide; it's about cultivating a meticulous approach to language that enhances readability and credibility for any publication.

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General Principles of Chicago Manual of Style Capitalization

The Chicago Manual of Style (CMOS) prioritizes clarity and convention in its capitalization guidelines. The overarching principle is to capitalize words that function as proper nouns, denoting unique entities, and to lowercase words that serve as common nouns, referring to general categories. This distinction is fundamental, but its application can be nuanced, requiring careful consideration of context and intent. Editors must develop a keen eye for identifying when a word is being used as a specific identifier versus a general descriptor.

A key aspect of CMOS capitalization is its approach to stylistic choices. While some style guides might be more prescriptive, Chicago often allows for a degree of judgment, particularly in areas like the capitalization of job titles when they precede a name versus when they appear independently. The manual emphasizes that consistency within a single document is paramount, even if minor deviations from strict rules occur. However, for the most part, adherence to the established rules ensures a predictable and professional reading experience for the audience.

Capitalizing Proper Nouns

Proper nouns are words that name a specific, unique person, place, or thing, and they are almost always capitalized in CMOS. This category is broad and encompasses a multitude of examples that editors frequently encounter. Understanding the scope of proper nouns is the first step in accurate capitalization.

People and Personal Names

This is perhaps the most straightforward category. All personal names and their derivatives, such as surnames, given names, and nicknames, are capitalized. This includes titles that are part of a name, like Dr. Smith or President Lincoln, when used before the name.

Places and Geographical Names

All specific geographical names are capitalized. This includes continents, countries, states, provinces, cities, towns, rivers, oceans, mountains, and deserts. For instance, "Asia," "Canada," "California," "New York City," "the Mississippi River," "the Pacific Ocean," and "the Sahara Desert" are all capitalized. When referring to regions, such as "the Midwest" or "Southern California," these are also capitalized as they denote a specific, recognized geographical area.

Organizations, Institutions, and Companies

The names of specific organizations, institutions, government bodies, and companies are capitalized. This includes universities, corporations, political parties, religious denominations, and associations. Examples include "Harvard University," "General Motors," "the Democratic Party," "Catholicism," and "the American Medical Association." If a company name includes a generic term (like "Company," "Corporation," "Inc."), that generic term is usually capitalized when it's part of the formal name.

Brands and Products

Trademarks and brand names are always capitalized. This applies to specific products and services. For instance, "Coca-Cola," "iPhone," and "Microsoft Word" are capitalized. Even if a brand name becomes a common verb (like "to Google" or "to Xerox"), the brand name itself remains capitalized when used as a noun.

Historical Periods and Events

Named historical periods, epochs, and significant events are capitalized. This includes "the Renaissance," "the Middle Ages," "World War II," "the French Revolution," and "the Civil Rights Movement." However, general terms like "a renaissance" or "a revolution" are not capitalized unless

they are part of a specific named event.

Days of the Week, Months, and Holidays

Days of the week, months of the year, and specific holidays are always capitalized in CMOS. Examples include "Monday," "January," "Christmas," and "Independence Day." Seasons like "spring," "summer," "fall," and "winter" are generally not capitalized unless they are part of a specific named event (e.g., "the Winter Olympics") or used in a poetic or figurative sense where capitalization might be intended for emphasis.

Capitalizing Titles of Works

Capitalizing titles of books, articles, films, songs, and other creative works follows specific rules designed for consistency and prominence. CMOS uses what is often referred to as "title case," though with particular guidelines for which words to capitalize.

Major Words Capitalized

In CMOS, all major words in a title are capitalized. This includes the first and last words of the title and all nouns, pronouns, adjectives, verbs, adverbs, and some adverbs. For example, in "The Lord of the Rings," "The," "Lord," "of," "the," and "Rings" would be capitalized according to CMOS principles.

Minor Words Lowercased

The exceptions to this rule are articles (a, an, the), prepositions (of, in, on, at, to, for, with, by, etc.), and conjunctions (and, but, or, nor, for, so, yet) that have four letters or fewer. These are typically lowercased unless they are the first or last word of the title or subtitle. So, in "A Tale of Two Cities," "A," "Tale," "of," "Two," and "Cities" would be capitalized. "of" and "Two" are an exception to the exception in this case: "of" is a short preposition and is lowercased, while "Two" is a number and is capitalized. The correct capitalization would be "A Tale of Two Cities."

Subtitles

The capitalization rules for subtitles are the same as for main titles. If a subtitle follows a colon, the first word of the subtitle is capitalized, and the rest follows the major/minor word rule. For example, "The Great Gatsby: A Novel" would be capitalized as "The Great Gatsby: A Novel."

Internal Capitalization

CMOS also provides guidance on internal capitalization within titles, such as for specific terms or proper nouns that might appear mid-title. These follow the standard rules for those specific words.

Capitalizing Headings and Subheadings

The capitalization of headings and subheadings contributes significantly to the visual hierarchy and readability of a document. CMOS offers clear guidelines for ensuring this hierarchy is effective.

Major Headings

Major headings, often used for chapter titles or main sections, typically follow the same title-case capitalization as titles of works. This means capitalizing the first word, last word, and all other major words. For instance, a major heading might read: "The Evolution of Digital Media."

Subheadings

Subheadings, which break down the content within a major section, can be capitalized in several ways, depending on the desired hierarchy and the author's preference, though consistency is key. They can also follow title case, or sometimes sentence case, where only the first word and proper nouns are capitalized. For example, a subheading could be "Early Innovations" or "early innovations." CMOS often suggests using a consistent approach throughout the document.

Consistency is Paramount

Regardless of the specific style chosen for headings and subheadings, the most critical rule is consistency. If title case is used for major headings, it should be used consistently. If sentence case is chosen for subheadings, that too must be applied uniformly. This principle extends to the capitalization of the first word after a colon within a heading or subheading, which should always be capitalized if it's considered the start of a new element.

Capitalizing Government and Organizations

Navigating the capitalization of government bodies, departments, and various types of organizations requires careful attention to distinguish between official names and general references.

Official Names

The official names of government bodies, agencies, departments, and political entities are always capitalized. This includes the "United States Congress," "the Department of Justice," "the Supreme Court," and "the City Council of Chicago." When referring to the specific name of an entity, capitalization is mandatory.

General References

However, when referring to these entities in a general or descriptive sense, lowercase is often appropriate. For example, one might write "the congress convened" or "the department announced new policies." The distinction lies in whether the term refers to the specific, named entity or to the concept or type of entity. Similarly, "the president" is usually lowercase unless it directly precedes a name or is used as a specific title in place of a name, as in "the President signed the bill."

International Bodies

International organizations, such as the "United Nations," "the World Health Organization," and "the North Atlantic Treaty Organization (NATO)," are capitalized as they refer to specific, unique entities.

Capitalizing Specific Entities and Concepts

Beyond the broad categories, CMOS addresses capitalization for a variety of specific entities and concepts, often requiring editors to make informed decisions based on context.

Religious Terms

Terms related to religion are often capitalized when they refer to a specific deity, religious figures, or foundational texts. This includes "God," "Lord" (when referring to the Christian deity), "Allah," "the Bible," "the Quran," and names of specific prophets or saints. Denominations and major religious movements are also capitalized, such as "Christianity," "Islam," "Judaism," "Buddhism," and "Hinduism." However, general terms like "gods" or "divine" are typically lowercase unless used in a specific religious context.

Scientific and Technical Terms

In science and technology, capitalization is generally reserved for proper nouns. This includes names of species (e.g., *Homo sapiens*), chemical elements (e.g., "Oxygen"), and specific named theories or

laws that are attributed to individuals (e.g., "Newton's laws of motion"). Generic scientific terms are not capitalized. For instance, "the theory of relativity" is often not capitalized unless it's part of a formal title. Specific taxonomies are capitalized based on convention, with genus names capitalized and species names in lowercase (e.g., *Canis lupus* for wolves).

Legal Terms

In legal contexts, specific court names are capitalized ("the U.S. Supreme Court," "the Court of Appeals"). Statutes and acts are also capitalized, such as "the Civil Rights Act of 1964." However, general legal terms like "the law," "a statute," or "a court" are not capitalized.

Directions and Regions

When directions (north, south, east, west) are used to denote specific regions, they are capitalized. For example, "the West Coast," "the Northeast," or "inhabitants of the South." When they simply indicate direction, they are lowercased: "The wind blew from the north."

Common Capitalization Pitfalls for Editors

Editors often encounter recurring challenges with capitalization that can lead to inconsistencies or errors. Awareness of these common pitfalls is crucial for maintaining a high standard of editing.

- **Overcapitalization of Common Nouns:** A frequent mistake is capitalizing common nouns that are not functioning as proper nouns. This can occur when an author wants to emphasize a term but does so by incorrectly capitalizing it. For example, capitalizing "book" when referring to any book, rather than a specific titled book.
- **Under-capitalization of Proper Nouns:** Conversely, failing to capitalize proper nouns is also common. This might involve missing the capitalization of brand names, company names, or specific geographical locations.
- **Inconsistent Application of Title Case:** For titles and headings, editors may struggle with the precise application of title-case rules, particularly regarding short prepositions and conjunctions.
- **Ambiguity in Job Titles:** The capitalization of job titles can be a grey area. CMOS generally advises lowercasing job titles when they follow a name or are used generically (e.g., "he is the president") and capitalizing them when they precede a name or are used as a formal title in place of a name (e.g., "President Biden").
- **Confusing Generic Terms with Specific Ones:** Distinguishing between a general term and a specific, named entity can be tricky. For instance, "a park" is lowercase, but "Central Park" is capitalized.

- **Misinterpreting Historical Periods:** While major historical eras are capitalized, less defined or more general historical references might be mistakenly capitalized.

Careful review and a strong understanding of the context in which words are used are essential to avoid these common errors. Referring back to the CMOS for specific guidance on borderline cases is always recommended.

The Role of Consistency in CMOS Capitalization

Ultimately, the most critical rule in Chicago Manual of Style capitalization, as in all aspects of editing, is consistency. While the manual provides detailed rules, there are instances where stylistic choices can be made. When such choices arise, or when an author's intent slightly deviates from strict adherence, the editor's primary responsibility is to ensure that the chosen style is applied uniformly throughout the entire document.

Consistency in capitalization enhances readability and professionalism. An inconsistent approach can distract the reader, undermine the author's credibility, and create an impression of carelessness. For editors, this means establishing a clear set of capitalization rules for a given project at the outset and meticulously applying them to every word. This commitment to consistency, guided by the principles of CMOS, is a hallmark of expert editorial work.

Q: When should I capitalize a job title in Chicago style?

A: In Chicago style, job titles are capitalized when they immediately precede a name (e.g., "President Lincoln") or when they are used as a formal title in place of a name in direct address (e.g., "Thank you, Doctor."). They are generally lowercased when used generically or following a name (e.g., "Abraham Lincoln, the president," or "she is the director of marketing").

Q: How do I capitalize "internet" in Chicago style?

A: Historically, "internet" was capitalized as "Internet" due to its status as a proper noun referring to a unique global network. However, CMOS now generally recommends lowercasing "internet" as it has become a more common noun, similar to "telephone" or "television."

Q: What is the rule for capitalizing the names of seasons in Chicago style?

A: In Chicago style, the names of seasons (spring, summer, fall, winter) are generally not capitalized unless they are part of a specific named event, such as "the Winter Olympics," or used in a poetic or figurative context where capitalization is for emphasis.

Q: How do I handle capitalization for social media platforms and websites in Chicago style?

A: Specific names of social media platforms (e.g., "Facebook," "Twitter," "Instagram") and popular websites (e.g., "Google," "Wikipedia") are capitalized as they are proper nouns. However, generic terms like "a website" or "social media" are not capitalized.

Q: Are acronyms and initialisms always capitalized in Chicago style?

A: Yes, acronyms and initialisms that are pronounced as words (like NASA or NATO) and initialisms that are pronounced letter by letter (like FBI or URL) are typically capitalized in Chicago style, provided they are established terms. It's important to check if a term has a specific established capitalization.

Q: What are the capitalization rules for brand names that have become generic verbs, like "to Google"?

A: When a brand name becomes a verb, the brand name itself remains capitalized when used as a noun, but the verb form is lowercased. For example, "I need to Google this information" (lowercase verb) versus "I used Google to find it" (capitalized noun).

Q: How do I capitalize titles of books or articles that contain hyphens?

A: For titles containing hyphens, Chicago style generally capitalizes the first word, the last word, and any word immediately following a hyphen that is considered part of the main title. This means if a hyphen connects two independent words that form a compound concept, both are often capitalized. For example, "A Well-Known Fact."

Q: When should I capitalize the word "federal" in Chicago style?

A: In Chicago style, "federal" is capitalized when it refers to the specific government of the United States (e.g., "the Federal Bureau of Investigation," "federal law"). It is lowercased when used more generally to refer to any confederation of states or as an adjective modifying a non-governmental entity (e.g., "federalism," "a federal system of government," "federal crimes in Canada").

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