

chicago manual of style capitalization rules for manuscripts and publications

The Chicago Manual of Style capitalization rules for manuscripts and publications are fundamental for ensuring clarity, consistency, and professionalism in written works. Mastering these guidelines is crucial for authors, editors, and publishers aiming for a polished and authoritative presentation. This comprehensive guide delves into the intricacies of Chicago style capitalization, covering everything from the general principles of title case versus sentence case to the specific treatment of proper nouns, titles of works, and common words that often cause confusion. We will explore how to navigate these rules to produce documents that adhere to established scholarly and professional standards, ultimately enhancing the reader's understanding and the credibility of the publication.

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General Principles of Chicago Manual of Style Capitalization

The Chicago Manual of Style (CMOS) offers a flexible approach to capitalization, allowing for stylistic choices while emphasizing consistency. Two primary approaches are sentence case and title case, each with its own set of applications. Sentence case, the default for most text, capitalizes only the first word of a sentence and proper nouns. Title case, on the other hand, capitalizes major words in titles, headings, and captions, with specific rules dictating which words to capitalize and which to lowercase. Understanding when to apply each is the first step in mastering Chicago style.

The overarching principle guiding capitalization in Chicago style is clarity. Capitalization serves to distinguish proper nouns from common nouns, to highlight important terms, and to signal the beginning of a sentence or title. When in doubt, consistency is key. If a particular style choice is made for a series of similar items, it should be applied uniformly throughout the manuscript or publication. This manual provides a framework, but good judgment and attention to detail are essential for accurate application.

Sentence Case vs. Title Case: When to Use Them

Sentence case is the standard for the main body of text, including paragraphs, captions, and headings that are treated as full sentences. In sentence case, only the first word of a sentence and proper nouns (names of specific people, places, organizations, etc.) are capitalized. This approach prioritizes readability and a more natural flow of language. For example, "The novel explores themes

of love and loss in a small town." Here, "The" is capitalized because it begins the sentence, and "town" is a common noun and thus lowercase.

Title case, conversely, is employed for the titles of books, articles, chapters, headings, subheadings, and other creative works. The rules for title case are more complex, involving the capitalization of the first and last words, all nouns, verbs, adjectives, adverbs, and pronouns. Prepositions, conjunctions, and articles are generally not capitalized unless they are the first or last word of the title. For instance, a title like "The Importance of Being Earnest" follows title case conventions, with "The," "Importance," "Being," and "Earnest" capitalized. The preposition "of" is lowercase because it is not the first or last word and is a minor word.

The Importance of Consistency in Capitalization

Regardless of whether sentence case or title case is employed, unwavering consistency is paramount. Once a decision is made regarding the capitalization of a particular word or phrase within a specific context, it must be adhered to throughout the entire document. Inconsistent capitalization can be jarring to the reader, creating an unprofessional appearance and potentially leading to misinterpretation. For example, if you capitalize "University" when referring to a specific institution in one instance and then lowercase it in another, it undermines the authority of the text.

This principle of consistency extends to all aspects of capitalization, from the treatment of proper nouns to the capitalization of terms within headings and titles. Editors often establish style sheets for larger projects to ensure all contributors follow the same capitalization rules. This meticulous attention to detail contributes significantly to the overall quality and credibility of the published work.

Capitalizing Titles of Works

The capitalization of titles is one of the most frequently encountered and sometimes perplexing areas of the Chicago Manual of Style. Whether it's the title of a book, an essay, a poem, a song, or a film, adhering to specific guidelines ensures that these creative works are presented accurately and professionally. Chicago style offers two main approaches to titling: title case and sentence case, and understanding their distinct applications is crucial.

Title case is the preferred method for capitalizing the titles of major works, such as books, journals, and films, when they appear in the text. This method involves capitalizing the first and last words, as well as all nouns, pronouns, verbs, adjectives, and adverbs. Articles, conjunctions, and prepositions are generally lowercased unless they are the first or last word. For instance, a book title like "A History of the World in 100 Objects" would capitalize "A," "History," "World," "100," and "Objects," while "of," "the," and "in" would remain lowercase.

Applying Title Case to Various Media

When applying title case to different media, the principles remain largely consistent, but nuances exist. For book titles, journal titles, and newspaper titles, the major words are capitalized as described above. For shorter works such as articles, essays, short stories, poems, and songs, title case is also typically used. This helps to visually distinguish these titles within the larger text. For example, an essay titled "The Enduring Appeal of Classic Literature" would be capitalized in title case.

In contrast, when referring to titles within a bibliography or reference list, Chicago style often reverts to sentence case for articles, essays, and short stories, while book and journal titles retain title case. This distinction is important for maintaining clarity and adhering to the conventions of different sections of a publication. Always consult the specific guidelines for bibliographies and reference lists provided by Chicago style.

Exceptions and Special Considerations in Title Capitalization

While title case has specific rules, there are several exceptions to consider. The first and last words of any title are always capitalized, regardless of their grammatical function. Furthermore, if a subtitle is present, its first word is capitalized, and the rest of the subtitle follows the same rules as a main title. For example, "Pride and Prejudice: A Novel of Manners." Pronouns, even short ones like "it" or "I," are capitalized in titles.

Certain stylistic choices might also influence title capitalization. For instance, if a specific author or publication has a unique way of capitalizing their own titles (e.g., all lowercase), that established style should generally be respected. However, for general manuscripts and publications, adhering to the standard Chicago title case rules is the safest and most professional approach. It is also important to note that some style guides or publishers might have their own specific modifications to Chicago's title capitalization rules, so always check project-specific guidelines.

Capitalizing Proper Nouns and Related Terms

Proper nouns are the backbone of accurate and specific communication, and their correct capitalization is a cornerstone of the Chicago Manual of Style. Proper nouns refer to unique entities, such as specific people, places, organizations, and branded products. Distinguishing them from common nouns is crucial for clarity and precision in any written work.

In general, proper nouns are always capitalized. This includes personal names (e.g., Jane Austen, Martin Luther King Jr.), geographical locations (e.g., Paris, Mount Everest, Atlantic Ocean), specific organizations and institutions (e.g., United Nations, Harvard University, Google), and brand names (e.g., Coca-Cola, iPhone). The principle is that if a noun refers to a unique, singular entity, it warrants capitalization.

Specific Categories of Proper Nouns

Several categories of proper nouns require careful attention. Personal names and titles used with names are capitalized (e.g., President Lincoln, Queen Elizabeth II). However, titles used alone or in a descriptive sense are typically not capitalized (e.g., the president, the queen). Similarly, names of specific historical periods, events, and movements are capitalized (e.g., the Renaissance, World War II, the Civil Rights Movement). Days of the week, months, and holidays are also capitalized (e.g., Monday, January, Christmas).

Geographical proper nouns are another extensive category. This includes continents, countries, states, cities, rivers, oceans, mountains, and specific neighborhoods. For example, North America, France, California, Chicago, the Mississippi River, the Pacific Ocean, the Rocky Mountains, and Greenwich Village are all capitalized. When names are composed of multiple words, each significant word is capitalized (e.g., New York City).

Capitalization of Organizations, Companies, and Products

The names of organizations, companies, and official bodies are capitalized when referring to the specific entity. This includes government agencies (e.g., the Department of State, the Federal Bureau of Investigation), corporations (e.g., Microsoft, Apple Inc.), and non-profit organizations (e.g., the Red Cross, the World Wildlife Fund). Similarly, branded products and services are capitalized as part of their trademarked names (e.g., Xerox, Kleenex, FedEx).

When referring to generic types of products, however, capitalization is not used. For example, one might refer to "a printer" or "facial tissues," but if referring to the specific brand, it would be "a Hewlett-Packard printer" or "Kleenex tissues." This distinction is vital for maintaining accuracy and avoiding trademark infringement.

Adjectives and Nouns Derived from Proper Nouns

Adjectives and nouns derived from proper nouns are generally capitalized if they retain a direct and exclusive connection to the original proper noun. For instance, "American" (derived from America), "Shakespearean" (derived from Shakespeare), and "Christianity" (derived from Christ) are capitalized. These terms refer to specific nationalities, literary styles, or religious beliefs directly tied to their proper noun origins.

However, if the derivative term has become so common that it no longer exclusively refers to the original proper noun, it may be lowercased. For example, "china" (referring to porcelain, derived from China) is typically lowercase. Similarly, "pasteurized" (derived from Louis Pasteur) is lowercase. The key is whether the word still functions as a direct proper adjective or noun, or if it has evolved into a general descriptive term.

Capitalization of Common Nouns and Miscellaneous Cases

Beyond the clear-cut rules for proper nouns and titles, Chicago style also provides guidance on the capitalization of common nouns and addresses various miscellaneous cases that often present challenges. Understanding these nuances is essential for achieving a high level of polish in any manuscript.

The default for common nouns is to be lowercase unless they begin a sentence or are part of a proper noun. This ensures that the text remains readable and doesn't appear overly stylized or emphatic. For example, "The book contained many interesting chapters," where "book" and "chapters" are common nouns and are appropriately lowercase.

Capitalizing Common Nouns for Emphasis or Specificity

While the general rule is to lowercase common nouns, there are specific instances where capitalization might be employed for emphasis or to denote a specific, often institutional, usage. For example, when referring to specific departments within a university, such as "the Department of English" or "the Office of Admissions," these are capitalized as part of their official titles. However, when referring to the generic concept, they would be lowercase: "the English department" or "the admissions office."

Similarly, in certain contexts, like religious texts or historical documents, specific common nouns might be capitalized to denote reverence or a particular meaning. For example, "the Word" when referring to the Bible. These are often stylistic choices or stem from tradition and require careful consideration of the intended audience and context. When in doubt, it is usually safer to stick to the lowercase convention for common nouns unless there is a clear justification for capitalization.

Capitalizing Terms in Specific Fields

Certain academic and technical fields have their own conventions for capitalization that may deviate from general Chicago style. For instance, in scientific contexts, the names of species are capitalized according to binomial nomenclature rules, but specific genera and species are often italicized rather than capitalized, except for the genus name. In legal documents, certain terms might be capitalized for specific legal meanings. It is crucial to be aware of the conventions of the specific discipline or industry for which you are writing.

For example, in biology, the genus *Homo* is capitalized, but the species *sapiens* is lowercase. Scientific names are typically italicized. In law, terms like "Plaintiff" or "Defendant" might be capitalized when referring to specific parties in a legal case. Always research and adhere to the established terminology and capitalization practices within your specific field to ensure accuracy and acceptance by experts.

Capitalization of First Words in Bulleted or Numbered Lists

The capitalization of the first word in bulleted or numbered lists can vary depending on whether each list item is a complete sentence or a fragment. If each list item is a complete sentence, then the first word of each item should be capitalized, just as it would be in a regular paragraph. For instance:

- The first point is important.
- The second point needs further consideration.
- The third point provides a solution.

However, if the list items are fragments or phrases that are not complete sentences, then only the first word of the first item in the list is typically capitalized, and subsequent items are not capitalized unless they contain proper nouns. For example:

- an important point
- further consideration needed
- a potential solution

Consistency is key here. Whichever approach is chosen, it should be applied uniformly throughout the list and across similar lists within the publication. The choice often depends on the overall style of the document and the editor's preference.

Capitalization in Specific Publication Types

The application of Chicago Manual of Style capitalization rules can subtly shift depending on the type of publication. While the core principles remain, different genres and formats may necessitate variations to maintain clarity, tradition, or reader expectation.

For academic books and scholarly articles, adherence to the detailed rules of title case for headings and titles, and sentence case for the body text, is standard. This ensures a professional and scholarly presentation. The consistent application of these rules lends authority and credibility to the research presented.

Academic Journals and Scholarly Books

In academic journals and scholarly books, capitalization plays a critical role in organizing

information and highlighting key elements. Headings and subheadings within the text are typically capitalized using title case, especially if they are meant to stand out and segment the content. However, some journals might opt for sentence case for subheadings to maintain a more uniform look. The abstract, introduction, body paragraphs, and conclusion all follow sentence case, with only the first word of sentences and proper nouns capitalized.

Titles of major works, such as the journal title itself or the book title, will prominently feature title case. Articles, chapters, and other smaller works within these publications will also use title case for their titles. Bibliographic entries have their own specific capitalization rules, often defaulting to sentence case for article titles within journals while retaining title case for journal titles themselves, all meticulously formatted for consistency.

Web Content and Digital Publications

The digital realm introduces its own set of considerations for capitalization. While the fundamental principles of Chicago style still apply, the interactive nature and varying design aesthetics of web content can influence how capitalization is used. Headings on websites and in digital articles often employ title case to draw the reader's attention, similar to print publications. However, some online platforms may favor sentence case for headings to create a cleaner, more modern look.

The capitalization of elements like navigation menus, button labels, and error messages also follows specific design and usability guidelines, which may or may not directly align with CMOS. Generally, for the textual content of web articles, blog posts, and online reports, the Chicago style rules for sentence case and title case remain the guiding principles. Consistency is paramount to ensure a professional user experience.

Trade Publications and Popular Magazines

Trade publications and popular magazines often adopt a slightly more relaxed approach to capitalization compared to strictly academic works. While proper nouns and the beginnings of sentences are always capitalized, the application of title case for headings and article titles might be influenced by the publication's overall design and brand identity. Some magazines might opt for all-lowercase headings or a more creative capitalization style to achieve a distinct aesthetic.

However, when these publications adhere to a style guide that references Chicago, they will likely follow its core principles. The goal in these contexts is often to balance clarity and readability with an engaging visual presentation. Editors in these fields might make stylistic choices that depart from strict adherence to CMOS title case for headings if it serves the publication's intended tone and audience.

Specialized Capitalization Considerations

Beyond the general rules and specific publication types, several specialized areas require particular

attention when it comes to capitalization according to the Chicago Manual of Style. These often involve abstract concepts, legislative terms, and specific naming conventions.

Understanding these specialized rules ensures that the nuances of terminology within various contexts are accurately represented, maintaining the precision expected in professional and academic writing.

Capitalizing Government and Legislative Terms

When referring to specific government bodies, legislative acts, and official documents, capitalization is crucial for accuracy. The names of specific governmental departments, agencies, and bureaus are capitalized (e.g., the Department of Justice, the Environmental Protection Agency). Similarly, official titles of legislation are capitalized (e.g., the Americans with Disabilities Act, the Civil Rights Act of 1964).

When referring to these entities or acts in a general sense, or when using common nouns to describe them, lowercase is typically used. For example, "a government agency" or "the latest civil rights legislation." The distinction lies in whether you are referring to a specific, named entity or a general category. Names of legislative bodies, such as Congress or Parliament, are capitalized when referring to the specific institution.

Capitalizing Religious and Philosophical Terms

The capitalization of religious and philosophical terms can be complex, often depending on tradition and context. In general, the names of deities, prophets, and specific religious figures are capitalized (e.g., God, Jesus Christ, Buddha, Allah). Major religious movements and doctrines are also capitalized (e.g., Christianity, Islam, Buddhism, Hinduism).

However, common nouns used in a religious context might be capitalized for reverence or specificity. For instance, "Heaven," "Hell," and "the Almighty" are often capitalized in religious texts. Similarly, philosophical concepts might be capitalized if they are being treated as specific doctrines or schools of thought. For example, "Platonism" or "Existentialism." When in doubt, consistency and adherence to the established terminology within the specific religious or philosophical tradition are recommended.

Capitalization in Commerce and Industry

In the realm of commerce and industry, capitalization is particularly important for brand names, trademarks, and company names. As mentioned earlier, brand names and trademarks are capitalized to signify their unique identity and legal status (e.g., McDonald's, Coca-Cola, Microsoft Windows). Company names are also capitalized (e.g., General Motors, Procter & Gamble).

When referring to generic product categories, however, lowercase is used. For example, "fast food"

or "soft drinks." Descriptive terms that become part of a brand name are capitalized, but generic terms are not. For instance, while "Apple Watch" is capitalized, "smartwatch" is not. It is essential to maintain accuracy and respect intellectual property by correctly capitalizing these terms as they are intended by their creators or owners.

The Chicago Manual of Style capitalization rules, while detailed, are designed to foster clarity and professionalism in all forms of written communication. By diligently applying these guidelines to titles, proper nouns, common nouns, and specialized terminology, writers and editors can ensure their manuscripts and publications meet the highest standards of accuracy and readability. A thorough understanding of sentence case versus title case, the specific treatment of various noun categories, and the adaptations for different publication types empowers creators to present their work with confidence and authority, making the content more accessible and credible to a broad audience.

Q: When should I capitalize the first word of a sentence in Chicago style?

A: In Chicago style, you always capitalize the first word of a sentence, regardless of its grammatical function. This is a universal rule for standard prose.

Q: What is the difference between sentence case and title case in Chicago style?

A: Sentence case capitalizes only the first word of a sentence and proper nouns. Title case capitalizes major words in titles, headings, and captions, with specific rules for minor words like articles, prepositions, and conjunctions.

Q: How do I capitalize titles of articles in Chicago style?

A: Titles of articles, essays, short stories, and poems are typically capitalized using title case, where the first and last words, along with all major words, are capitalized. Minor words are generally lowercased unless they are the first or last word.

Q: Are proper adjectives derived from proper nouns always capitalized in Chicago style?

A: Proper adjectives derived from proper nouns are generally capitalized if they retain a direct and exclusive connection to the original proper noun (e.g., American, Shakespearean). However, if the term has become a common word, it may be lowercased (e.g., china for porcelain).

Q: How should I capitalize headings in a Chicago-style manuscript?

A: Headings in a Chicago-style manuscript are often capitalized using title case, following the rules

for titles of works. However, some publications may opt for sentence case for headings, especially for subheadings, to maintain a consistent look. Always check the specific style guide for the publication.

Q: What are the rules for capitalizing days of the week and months in Chicago style?

A: Days of the week (e.g., Monday, Tuesday) and months of the year (e.g., January, February) are always capitalized in Chicago style.

Q: When do I capitalize common nouns in Chicago style?

A: Common nouns are generally kept lowercase unless they begin a sentence, are part of a proper noun, or are capitalized for specific emphasis or in specialized contexts, such as official department names (e.g., Department of English) or for reverence in religious texts.

Q: How are plurals of proper nouns capitalized in Chicago style?

A: Plurals of proper nouns are capitalized just like their singular forms. For example, if "Smith" is a proper noun, then "the Smiths" refers to the family and is capitalized. If "Apple" is a company name, then "multiple Apples" (referring to multiple instances of the company or its products) would still capitalize "Apples."

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