

# The Herb Society of America, Inc. Style Manual



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The Herb Society of America (The Society or HSA) actively works to disseminate knowledge about herbs. The Society has developed its own style guide, based on such major references as *The Chicago Manual of Style: The Essential Guide for Writers, Editors, and Publishers* and Council of Science Editors (CSE), *Scientific Style and Format: The CSE Manual for Authors, Editors, and Publishers*. This manual presents a concise format of the accepted usage of terms that are often found in all official HSA publications.

This guide is not intended to be an exhaustive reference for HSA authors, but it is hoped the information here will answer most questions for those writing for HSA publications. The general editorial rules that apply today favor fewer of many things than applied in the past. That means punctuation only when necessary to avoid misreading, and capitalization in many fewer instances than in the past. In addition, we request that authors use active voice rather than passive voice.

If you have questions which are not answered by this guide, please contact HSA Headquarters at 440-256-0514. Authors submitting articles for a specific publication, e.g., *The Herbarist*, newsletters, or the blog, should consult the Guidelines for Authors under the submissions tab on the publications section of the website.

## GENERAL FORMATTING GUIDELINES

For consistency and ease of editing and processing, HSA requests that authors format their contributions utilizing the guidelines below. While manuscripts submitted to *The Herbarist* or lengthy herbal essential guides will benefit from all the guidelines, book reviews, newsletter articles, and brief notes may not use the entire list. When in doubt, check with HSA Headquarters.

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**Title.** Please provide HSA with a suggested title of your publication. Include the title and your name on the first page of text, not as a separate cover page.

### **General.**

- Place the page number in the lower center of each page
- Double space between sentences
- Indent paragraphs 0.5"
- Use Times New Roman 12 font
- Use Automatic font color, *i.e.* black
- Use margins of at least one inch on all sides of the page
- Allow one space between sentences and after punctuation marks separating text (colon or semi-colon)

**Headings or sections.** Use headings or sections to help readers follow the organization of a manuscript or article.

**Visuals.** Indicate within the text where you want any provided images placed. Include the images at the end of the submission, with a brief title or description as well as the image credit. You may also submit the images in a separate document. Digital images should be of high resolution (at least 300 dpi and a minimum of 5" x 7") and in jpeg format.

**Sources or references.** Please cite works to which you have made specific reference using the author-date system (see page 4).

**Literature Cited List.** A list of references at the end of the text provides full publication information for each source. Entries in the reference list are alphabetized by author surname and are not numbered (see pages 4-7).

**Bibliography.** List the material you used in preparing your essay but did not specifically cite at the end of the text. Entries in the bibliography are listed alphabetically and are not numbered (see page 8).

**Plant Nomenclature.** Provide correct scientific names for plants mentioned in the text (see pages 8-11).

## Documentation

HSA bears the responsibility of providing information in all publications that, at the time of publication, is accurate, may be verified, and furnishes resources for the readers' future studies. This, in turn, requires that authors provide documentation for content that is not clearly based on the authors' professional experiences, training, or academic expertise. As in all scientific or professional writing, the preferred reference is the primary source. Open platform online sites that may be edited by readers, e.g. Wikipedia, will not be accepted as a source for content.

The format for documentation may vary across publications to ensure reading ease. *The Herbarist* and Notable Native™ Guides use a within text method for documenting sources and provide a list of literature cited as well as bibliography, as appropriate. Shorter publications – herb fact sheets, newsletters, and blog posts – may conclude simply with a bibliography.

### ***General principles for formatting literature cited (The Herbarist, Notable Native™ Guides, and Essential Herbal Guides)***

HSA uses the author-date method for documenting sources. Each in-text citation is placed in parentheses and includes the author's name and year of publication. Insert citations immediately following an author's name or at the end of the sentence when no specific author is noted for the assertion. Examples:

Jones' popular book (Jones, 2008) states that herbs are becoming more popular.  
Rosemary has been included in herbal shampoos for generations (Smith and Jones, 1997; Johnson, 2009).

At the end of the work, the literature cited list provides full publication information for each source specifically referenced within the document. Entries in the literature cited list are alphabetical by last names of the authors, then initials if last names are the same, and chronological, if duplicate author names appear. Verify all entries against original sources.

Double check that all citations in the manuscript text are in the literature cited list and vice-versa. Below are tables with examples of sources and sample citations. You may also consult *The Chicago Manual of Style: The Essential Guide for Writers, Editors, and Publishers*. *The Chicago-Style Citation Quick Guide* can be found at [http://www.chicagomanualofstyle.org/tools\\_citationguide.html](http://www.chicagomanualofstyle.org/tools_citationguide.html). Note that HSA has modified these style references to suit our organization's needs.

## Books

### Important Elements:

- Author (last name, first and middle initial, or as noted in the cited publication. For multi-authored works, list the first five authors and then “*et al.*” Author names after the first are

in first name, middle initial, last name order.

- Year of publication
- Title (capitalize only the first word of title and proper nouns; do not italicize the title)
- Place of publication (city, state)
  - state name may be omitted for major cities
  - state name may use the zip code abbreviations
- Publisher (short form permissible)
- Page numbers in chapter

Citing Books	
Source	Sample Citation
Single author	Rose, J. 1987. Jeanne Rose's Modern Herbal. New York: Putnam.
Two or more authors	Jones, B. F., Z. C. Wesson, and J. E. Smith. 1998. Hollies. New York: Wiley.
Book chapter	Brown, A. G. 1995. Apples, p. 3-37. In: J. Janick and J. N. Moore (eds.). Advances in fruit breeding. West Lafayette, IN: Purdue Univ. Press.
Dissertation	Reeder, J. D. 2001. Nitrogen transformations in revegetated coal spoils. PhD diss., Colo. State Univ.
Encyclopedia	Do not include in reference list. Citation is made in the text as shown below. According to the eleventh edition of <i>World Book</i> , there are only 30 California condors in existence, and those are in captivity.

## Articles from print periodicals: scholarly journals, abstracts, magazines and newspapers

### Important Elements:

- Author (last name, first, and middle initial, or as noted in the cited publication. For multi-authored works, list the first five authors and then “*et al.*” Author names after the first are in first name, middle initial, last name order
- Date of publication of article
- Title of article (capitalize only the first word of title and proper nouns)
- Title of publication (abbreviation is permitted and should follow standard usage)
- Volume followed by issue number in parenthesis if appropriate
- Page numbers of article

Citing Articles from Print Periodicals	
Source	Sample Citation
Scholarly journal	Goldberg, D., B. Cornat, and Y. Bar. 1991. The distribution of roots, water, and minerals as a result of trickle irrigation. <i>J. Amer. Soc. Hort. Sci.</i> 96:645-648.

Abstracts	Newmith, W. C. and W. M. Dowler. 1973. Cold hardiness of peach trees as affected by certain cultural practices. HortScience 8(3):267 (abstr.).
Periodical	Blumenthal, M. 2000. Interactions between herbs and conventional drugs: introductory considerations. Herbalgram. 49:52-63.
Daily newspaper	Do not include in reference list. Citation is made in the text as shown below. Example: In an article in <i>The Plain Dealer</i> , 21 April 1999, Dick Feagler stated...

## Internet resources

The basic rules for citations do not differ for internet items from what is required for print sources. Simply listing a URL is not sufficient; all the publication information should be listed.

Springerlink is one of several sites which aggregate journal articles in the sciences and make them available online. It is important to include the entire link to the article you are referencing, just as you list page numbers in an article so that readers can go directly to the information you are referencing.

## Online articles and books

### Important Elements:

- All the publication information (see print information, above)
- Add date accessed
- Indicate available from: URL (Note that there is no punctuation at the end of a URL reference)

Citing Internet Resources	
Source	Sample Citation
Online article	Koutsos, T. V., P. S. Chatzopoulou, and S. T. Katiostotis. 2009. Effects of individual selection on agronomical and morphological traits and essential oil of a “Greek basil” population. Euphytica 170:365-370. Accessed January 13, 2013. Available from: <a href="http://link.springer.com/search?query=Basil&amp;search-within=Journal&amp;facet-journal-id=%2210681%22">http://link.springer.com/search?query=Basil&amp;search-within=Journal&amp;facet-journal-id=%2210681%22</a>
Online book	Griffiths, A. J. F., J. H. Miller, D. T. Suzuki, R. C. Lewontin, and W. M. Gelbart. Introduction to Genetic Analysis. 7th ed. New York: W. H. Freeman & Co. Accessed May 31, 2005. Available from: <a href="http://www.ncbi.nlm.nih.gov/bookshelf/br.fcgi?book=iga">http://www.ncbi.nlm.nih.gov/bookshelf/br.fcgi?book=iga</a>

## Websites

### Important Elements:

- Title of website
- Place of publication and publisher
- Date of publication and date of last update (if relevant)

- Date you accessed the information
- Indicate available from: URL (Note that there is no punctuation at the end of a URL reference)

Citing Web Sites	
Source	Sample Citation
Homepage	APSnet: plant pathology online (Internet). St Paul (MN): American Phytopathological Association. Accessed June 20, 2005. Available from: <a href="http://www.apsnet.org/">http://www.apsnet.org/</a>
Database	PLANTS Database (Internet). 2012. PLANTS Profile for <i>Monarda fistulosa</i> (wild bergamot) USDA PLANTS. United States Department of Agriculture Natural Resources Conservation Service. Accessed December 19, 2012. Available from: <a href="http://plants.usda.gov/java/profile?symbol+MOFI">http://plants.usda.gov/java/profile?symbol+MOFI</a>

### General principles for formatting bibliographies (All publications)

A bibliography contains titles for additional reading (particularly germane to the article's topic) or works that were general sources for the article. Generally, an article with many citations, i.e., a long reference list, would not have a lengthy bibliography. Titles in a literature citation list are not included in a bibliography.

### Bibliography

#### Important Elements:

- Arrange in a single alphabetical list authors' last name
- Do not number list entries. Multiple listings by the same author are in chronological order.
- The order of publication information includes the title in italics, city (and state) followed by a colon, publisher name, and date
- Capitalize and italicize titles. Place publication date at the end of the listing

#### Sample Bibliography

Belsinger, Susan and Arthur O. Tucker. *The Culinary Herbal*. Portland, OR: Timber Press, 2016.

Mieseler, Theresa. *Beyond Rosemary, Basil, and Thyme*. Chaska, MN: Theresa Mieseler, 2019.

Schlosser, Katherine K., ed. *The Herb Society of America's Essential Guide to Growing and Cooking with Herbs*. Baton Rouge, LA: Louisiana State University Press, 2007.

Tucker, Arthur O. and Thomas DeBaggio. *The Encyclopedia of Herbs*. Portland, OR: Timber Press, 2009.

## NOMENCLATURE

There are strict rules regarding botanical nomenclature that must be followed. HSA's reference of choice is *The Plant List*, [www.theplantlist.org](http://www.theplantlist.org). We will use only botanical names that are listed as accepted names. If the name you find in source material is not listed as accepted, click on it, and you will be sent to a page that tells you the accepted name you should use. You may even find that the accepted name is in a different genus as in this example: *Ocimum aegyptiacum* Forssk. is a synonym of *Plectranthus aegyptiacus* (Forssk.) C. Chr., the accepted name. Synonyms are previously accepted names.

*The Plant List* includes 1,064,035 scientific plant names of species rank. Of these, 350,699 or 33% are accepted species names.

The author of a botanical name is the person who first published the name of that plant. Rules for author citations in botany are published in the *International Code of Nomenclature*, <https://www.iapt-taxon.org/nomen/main.php>. There are also rules for accepted standardized abbreviations used for citing the author who validly published the name of a taxon. They are found in *Authors of Plant Names* by Richard Kenneth Brummitt and C. E. Powell. The abbreviation L. for Carl Linnaeus (or Carolus Linnæus) (1707–1778) is by far the most common. Plant author names should be included in articles for *The Herbarist* and in herbal monographs. Author names are cited only with the first use of the plant name in the article. Examples:

*Ocimum basilicum* L. is accepted. Ten varieties of the genus are listed as synonyms (*i.e.* not accepted). The names were used in the past.

*Ocimum falcatum* Gand. Is a synonym of *Ocimum forsskaolii* Benth., the currently accepted name.

A more complex example: *Ocimum albostellatum* (Verdc.) A. J. Paton. The name in parentheses indicates the name of this plant was first published in a different genus by Bernard Verdcourt and then reclassified and published by Alan James Paton.

When "ex" is a component of the author citation, it denotes the fact that an initial description did not satisfy the rules for valid publication, but that the same name was subsequently validly published by a second author or authors (or by the same author in a subsequent publication). In this example, *Ocimum lamifolium* (Hochst. ex Benth.), Christian Hochstetter first described this plant, but not in an accepted publication. George Bentham, described as the premier systematic botanist of the nineteenth century, later validly published this plant name with the same description.

Note that author names appear in a smaller font size (9), rather than 12.

**Please refer to the figures below and to the ten common practices we have listed for clarification.**

*Ocimum obovatum* var. *galpinii* (Gürke) A. J. Paton

genus      specific epithet      variety      (first author) second author

*Salvia officinalis* ‘Tricolor’

genus      specific epithet      cultivar

*Petroselinum crispum* var. *neopolitanum*

genus      specific epithet      variety

*Chrysogonum virginianum* var. *australe* ‘Mark Viette’

genus      specific epithet      variety      cultivar

*Thymus praecox* ssp. *Arcticus*

genus      specific epithet      subspecies

The genus name is capitalized, the specific epithet is not (even when it is a proper adjective, as was done in older references such as *Hortus III*). Both the genus and specific epithet are italicized

1. A cultivar refers to a cultivated variety and may be the result of hybridization, random mutation, or plant selection. For our purposes, a cultivar differs from a variety in that the definable factors that make a cultivar unique are not passed from generation to generation by seed. All primary words within a cultivar name begin with an upper-case letter and the whole name is enclosed in single quotes. Since 1959, all new cultivars are given names in the vernacular (i.e. English, German, etc.) *not* in Latin. Prior to 1959, cultivars could be given Latin names (i.e. ‘Picta’, ‘Variegata’, ‘Flore-Plena’). Because cultivars are not grown from seed, they are not included in *The Plant List*.
2. A variety is a naturally occurring plant. The definable factors that make a variety unique can be passed on to succeeding generations via asexual *and* sexual reproduction. A variety name is not capitalized but is always italicized. The abbreviation “var.” is not italicized. The variety name is always in Latin form.
3. Interspecific crosses (crosses between two species within a genus) are denoted by a “×” immediately preceding the specific epithet. There is no space between the “×” and the succeeding word. When typeset in final printing, the “x” is set as a multiplication symbol. In cases where the parentage of the hybrid is known, it is optional to list the names in parentheses after the hybrid name to provide more information. Often this is not done in popular literature, unless it is important to the article, but parentage, if known, is usually listed upon first usage in scientific articles and reference books. Parentage is listed only upon first reference.
4. Intergeneric crosses (crosses between members of different genera) are denoted by an “X”

immediately preceding the genus. As with interspecific crosses, parentage is optional, but it is usually included with scientific articles and reference books.

***XHeuchera alba* (*Heuchera brizoides* × *Tiarella wherryi*)**  
intergeneric cross

***Lavandula* × *intermedia* (*L. angustifolia* × *L. latifolia*)**  
interspecific cross

**Correct:** *Salvia* ‘Raspberry Royale’ (*S. greggii* × *S. microphylla*) bears magenta flowers in late summer and fall.

**Correct:** *Salvia* ‘Raspberry Royale’ bears magenta flowers in late summer and fall.

**Incorrect:** *Salvia greggii* × *Salvia microphylla* ‘Raspberry Royale’ bears magenta flowers in late summer and fall.

**Incorrect:** *Salvia* (*S. greggii* × *S. microphylla*) ‘Raspberry Royale’ bears magenta flowers in late summer and fall.

**5.** When a plant is first mentioned, the entire botanical name must be listed. For instance, *Lavandula angustifolia* ‘Munstead’ can be shortened to *L. angustifolia* ‘Munstead’ after the first mention, or even just to ‘Munstead’. In the same article, another cultivar of *Lavandula angustifolia* can be referred to as *L. angustifolia* ‘Hidcote’ upon first mention and after that as just ‘Hidcote.’

**Correct:** *Lavandula angustifolia* ‘Hidcote’ is taller than *L. angustifolia* ‘Jean Davis.’ The pink-flowered ‘Jean Davis’ is 10-15” tall, while ‘Hidcote’ reaches 18” in height.

**Correct:** *L. angustifolia* ‘Twickel Purple’ has lighter purple flowers than ‘Hidcote.’

**Incorrect:** *L. angustifolia* ‘Hidcote’ is taller than ‘Jean Davis.’ The pink-flowered *Lavandula angustifolia* ‘Jean Davis’ is 10-15” tall while ‘Hidcote’ reaches 18” in height. ‘Twickel Purple’ has lighter purple flowers than *Lavandula angustifolia* ‘Hidcote.’

**Correct:** *Salvia leucantha* blooms late in the summer, while *Salvia* × *superba* ‘Blue Hill’ blooms in June. *Salvia azurea* var. *grandiflora*, like *S. leucantha*, also blooms in the fall. The flowers of ‘Blue Hill’ are lighter blue than those of *S. leucantha* and *S. azurea* var. *grandiflora*.

**6.** While a cultivar name can stand alone after first reference, a variety name or specific epithet must never stand alone

**Correct:** *Salvia leucantha* blooms late in the summer as does *Salvia elegans*. The flowers of *S. leucantha* are vivid purple while those of *S. elegans* are red.

**Incorrect:** *Salvia leucantha* blooms late in the summer as does *Salvia elegans*. The flowers of *leucantha* are vivid purple while those of *elegans* are red.

### SP. VS. SPP. VS. HYB.

7. The abbreviations sp., spp., and hyb. are never italicized or underlined.
- “sp.” means the specific epithet of a species is unknown or unspecified
  - “spp.” refers to more than one species within a genus, known or unknown. It does not refer to more than one plant of a single species
  - “hyb.” is used the same way as “sp.,” but for a plant of hybrid origin for which the parentage is unknown or unspecified

**Correct:** Mint (*Mentha* spp.) is used to flavor iced tea.  
She used a rosemary sprig (*Rosmarinus* sp.) to garnish the plate.  
I could tell the plant was a hosta (*Hosta* hyb.) but did not know which one.

### COMMON NAMES

Common names are not capitalized unless they contain a proper noun.

**Correct:** rosemary, flax, agrimony, Queen Anne’s lace, black-eyed Susan  
Rosemary is the #454 ranked female name by popularity.

8. The use of botanical names as common names or the mixing of the two should be avoided.

**Correct:** The subjects of the fine arts contest are *Salvias* and *Rosmarinus*.  
The subjects are sages and rosemaries.

**Incorrect:** The subjects are *salvias* and *rosemaries*.

### MISC.

For better clarity, HSA uses scented *Pelargoniums* instead of scented geraniums. The genus *Geranium* has radially symmetrical flowers and the flowers of *Pelargoniums* have two upper petals which are different from three lower petals.

Note that the “s” that makes *Salvias* and *Pelargoniums* plural is not italicized.

## GRAMMAR AND USAGE

This section follows The Chicago Manual of Style with some modifications unique to The Society.

### ***Capitalization.***

- Capitalize job titles and proper names following HSA, a district, or unit name  
The HSA Secretary sent the minutes to the board.  
The education chair is working on the document.  
The South Central District Symposium will be in Little Rock.  
The Philadelphia Unit Chair will attend the meeting.  
Jane Doe is the new chair of the unit.  
Unit Chair Jane Doe will speak to the group.
- Capitalize job titles when associated with a proper name  
Jane Doe, President of HSA, will attend.  
The president will attend.
- Capitalize unit and district when identifying a specific group  
The Connecticut Unit held a plant sale.  
The unit held a plant sale.
- Capitalize “the” when referring to The Society or The Herb Society. Early members of The Society asked that this tradition be maintained. Use the correct full title of the organization: The Herb Society of America, *Inc.*, The Society, or The Herb Society.
- Do not capitalize the article “the” when used before a unit or district name:  
the West District, the Chattahoochee Unit  
Note: an occasional unit, such as The New England Unit, may traditionally have capitalized “the”.
- Always capitalize Board of Directors, even if not preceded by HSA  
The Board of Directors met last week.  
The board will meet tomorrow.
- Do not capitalize inanimate objects when following HSA  
HSA computer, HSA website, HSA programs, HSA announcements  
Exception: HSA Headquarters, HSA Library
- Do not capitalize member and member at large unless associated with a name  
HSA Member at Large Jane Doe is coming to the meeting.  
HSA Member Jane Doe will announce the program.  
She spoke to the members at large.  
HSA members receive a discount on this publication.
- Capitalize events held by The Society, its units, and its districts when preceded by the unit or district name. Always capitalize Educational Conference and Annual Meeting of Members but not “annual meeting” when used alone.  
The annual meeting will be held in Charleston.  
The Annual Meeting of Members will be held in Charleston.  
The South Central District Symposium was a success.  
The symposium was a success.

### ***Common Problem Words.***

- e-mail, ad hoc, bylaws, member at large (no dashes), PowerPoint, online
- Spell out “and” instead of using “&”
- Singular and plural counterparts

**Correct singular form:** symposium, arboretum, genus. **Correct plural form:** symposia, arboreta, genera

- Which vs that: When the sentence is clear without the phrase, use *which*. If it is not clear without the phrase, use *that*.

**Correct:** I gave him the book that had a red cover. (Meaning: there were several books, but I gave him one with a red cover.)

**Correct:** I gave him the book, which had a red cover. (Meaning: there was only one book and it happened to have a red cover.)

### ***Trademarked Names.***

- Always use the trademark symbol with the following names. Note that the symbol appears in a smaller font size (9, rather than 12).
  - GreenBridges™ Initiative
  - Notable Native™ herbs
  - Notable Native™ shrubs
  - Herb of the Year™ (International Herb Association program)

### ***Tenses.***

- Avoid using the passive voice with verbs
- Avoid tense shifts/disagreements

**Correct:** She wrote about herbs and described them well.

**Incorrect:** She wrote about herbs and describes them well.

### ***Numbers.***

- Generally, one through ninety-nine should be spelled out
- Century references, *e.g.* 21<sup>st</sup> century, may be expressed numerically unless the phrase occurs as the sentence opener
- Dates and a series of numbers (*e.g.*, 45, 62, 34) are written as numerals
- Numbers at the beginning of a sentence are spelled out
- Use words for fractions. Exceptions: fractions used in addresses, in recipes, monetary amounts, or percentages, *etc*

***Abbreviations.***

- Do not use periods in abbreviations

**Correct:** PO Box, PhD, US, BCE, CE

- Do not abbreviate member at large (MAL)

**Correct:** She is a member at large.

**Incorrect:** She is a MAL.

- Insert a space between initials

**Correct:** M. O. Campbell Center

***Serial comma.***

- Separate elements in a series by commas

**Correct:** Jane brought dill, parsley, and rosemary for the demonstration.

**Incorrect:** Jane brought dill, parsley and rosemary for the demonstration.

- When a conjunction joins the last two elements, place a comma before the conjunction

**Correct:** Jane brought dill, parsley, and oregano, but not rosemary.

- Elements in a series should be in the same construction, *i.e.* all nouns, all verbs, or whatever

**Correct:** He brought apples, strawberries, and pears, and later he added peaches.

**Incorrect:** He brought apples, strawberries, pears, and later added peaches.

***Colon and Semicolon.***

- Use a colon when the second clause expands or explains the first clause-

**Correct:** Only a third of the members were present: for most, the weather was a factor.

- Use a colon to introduce a list only when the introductory text is a complete sentence-

**Correct:** Please bring the following herbs: parsley, sage, rosemary, and thyme.

- Use a semicolon between two independent clauses-

**Correct:** Artificial fertilizers are common in garden supply stores; your own compost, however, offers similar benefits without cost!

***Hyphen.***

- Use a hyphen when two or more words are adjectives before a word they are modifying.

**Correct:** It was a less-than-stellar meeting.

***Quotation marks.***

- Enclose titles of articles or presentations in double quotes

**Correct:** The audience enjoyed her presentation, “The Fragrance of Herbs.”

- Enclose titles of unpublished works, speeches, thesis, manuscripts, or presentations within quotation marks

**Correct:** The “Angelica Fact Sheet” is on the website.

**Correct:** She used the “Basil Essential Guide” as a reference.

- Enclose punctuation marks that are part of a quotation within quotation marks

**Correct:** Carol James stated, “Not all potted herbs need to be moved into your garage for the winter!”

**Incorrect:** Carol James stated, “Not all potted herbs need to be moved into your garage for the winter”!

***Italics.***

- Use italics for genus and species, titles of books, pamphlets, periodicals, proceedings, foreign words not commonly used in English, and movie titles