



ORGANIZATION STUDIES

OS Style and Reference Guide

April 2021

The OS Style Guide is based on the **SAGE UK Style Guide** with some adjustments. See points [1. Article Opening Material](#) and [2. Grammar and Spelling](#) below.

The OS Reference Style is based on the **APA Reference Style**¹ with **one important modification**: In the **Reference list** authors' names should include the full first name of the author and initials (followed by full stop) for any further given names. For details and examples, see point [3. OS Reference Style](#) below.

1. Article Opening Material

Article title

Please format with an initial capital only and remaining words lower case (unless names). Run on subtitle after colon (with initial capital).

Author name and affiliation

List authors' full names (initials, followed by full-stop, only for any further given names) in the order that they appear on the manuscript, with their affiliations directly following their names. Please chase affiliations where missing. Please limit the affiliation to institution and country ("UK", not "United Kingdom", and "USA", not "United States").

Examples

Vern L. Glaser

University of Alberta, Canada

Rebecca Piekkari

Aalto University School of Business, Finland

Peer C. Fiss

University of Southern California, Los Angeles, USA

Note: If there are multiple authors with the same affiliation, this affiliation has to be repeated under each author's name.

Abstract

'**Abstract**' should appear in bold without a colon in a separate paragraph.

Keywords

'**Keywords**' (all one word) should appear in bold without a colon on a separate paragraph. Keywords should follow in a separate paragraph, separated by commas only. Please format accordingly.

Corresponding author (applies when preparing accepted article for AAM and OnlineFirst)

A postal and email address for the first or corresponding author only should be added to all article opening material. Please give it as follows (please note: no fax/telephone numbers):

Corresponding author: John Smith, Department of Social Studies, 4 Sample Road, London N12 9OP, UK. Email: john.smith@ucl.ac.uk

¹ See <http://www.apastyle.org/> to obtain information about APA style. The full guidelines are published in the **Seventh Edition (2020)** of the *Publication Manual of the American Psychological Association* and anyone working on APA-style journals is strongly encouraged to refer to this *Manual* in the first instance.

2. Grammar and spelling

UK spellings for European articles; US spellings for North American articles. Rest of the world – follow your own style but be consistent. Canadian spellings should be standardized to UK or US, depending on your preference.

Follow Oxford English Dictionary and use -ize and -yse spellings. The following list shows some common exceptions to the 'ize' rule:

Samples							
advertise	arise	devise	enfranchise	expertise	merchandise	promise	surmise
advise	chastise	disenfranchise	enterprise	franchise	misadvise	reprise	surprise
affranchise	circumcise	disguise	exercise	improvise	premise	revise	televise
apprise	comprise	emprise	excise	incise	prise	supervise	treatise

Note also: analyse (for UK), catalyse, dialyse, paralyse.

Do not mix English and US spellings. Some common US variations in spelling:							
analyze	color	favor	fulfill	labor	license (noun)	program	traveler/traveling
behavior	counseling	fetus	gray	mold	pediatrics	practice (verb)	willful

Punctuation and formatting

Commas: follow your own style but be consistent.

Use of Oxford comma in lists:

Italians, Norwegians and Spaniards (UK)
Italians, Norwegians, and Spaniards (US)

Parentheses are used throughout; square brackets are used only to enclose parenthetical material already in parentheses and to enclose an author's comment within a quote, e.g. [sic], [emphasis added].

Quotes: use single quotes, with double quotes within quoted material.

Hyphenation: the basic rule is to follow author style but be consistent.

Upper and lower case: we ask for a consistent usage. For specific titles use initial caps, for generic titles use lower case:

(a) Institutions, movements, denominations, political parties:

the Roman Catholic Church
he has catholic tastes.
They were Bolsheviks
bolshevism, communism

(b) Titles, ranks:

the President (referring to a particular one)
the Spanish Foreign Minister
a president
several government ministers

(c) Geographical names:

Capitalize politically defined or geographically named places, use lower case in all other instances.

the West, the East
western values, eastern culture
South Africa
the south of Scotland

(d) Periods, events:

Second World War
rationing during the war

(e) Article and book titles: follow the style used in the references.

Roman and italic:

Anglicized words should be roman with no accents.

Common examples:

ad hoc	elite	per capita
a priori	en masse	per se
a propos	en route	post hoc
avant-garde	et al.	post mortem
bona fide	in situ	raison d'être
bourgeois/bourgeoisie	laissez faire	sine qua non
cafe	nouveau riche	status quo
coup d'état	op. cit.	vice versa
de facto	per annum	vis-a-vis

Words in other languages: we ask for a consistent usage of your style.

Quoted text: spellings and punctuation in quoted texts should not be altered. If they are obviously incorrect, query with author or insert [sic].

(a) Undisplayed quotes:

Short quotations should be indicated by single quotation marks, with double quotation marks for quotation material within the quote. A full point (or other punctuation) follows the reference for the quote, e.g. '... is the most decisive and important' (Smith, 2003: 45).

(b) Displayed quotes:

Lengthy quotes (40 words or more) should be displayed and indented – please see recent OS publications and follow journal style.

Lists: Please see recent OS publications and follow journal style.

Abbreviations

General

1. Do not use abbreviations in the title of a paper, in the abstract, in the keywords or in headings and subheadings within the paper, unless the full version is very long and clumsy or the abbreviation is better known than the full term. If in doubt, spell out.
2. Define an abbreviation the first time that it is used (except in the abstract): write the term out in full followed by the abbreviation in parentheses. Use the abbreviation consistently thereafter, including at the start of sentences.
3. For plural terms, use plural abbreviations (plural s at the end).
4. If you need to abbreviate months or days of the week (for example, in a crowded table), use the first three letters without a full-stop (Mon, Tue, Jan, Feb).
5. If abbreviations are used in a figure or table, they must all be defined in the legend even if they are also defined in the text.
6. Do not use abbreviations invented by the author of a paper for that paper – ideally, only conventional, generally-accepted abbreviations should be used.
7. Do not abbreviate single words (exceptions apply) or use two-letter abbreviations other than those listed below.
8. Abbreviations consisting of capital letters, and acronyms and contractions, should not take full points, e.g. USA, UK, MA, UN, WHO, PhD, NATO (or Nato), UNESCO (or Unesco), AD, BC.
9. Unfamiliar abbreviations should always be written out in full when first mentioned, with the abbreviated form following in parentheses, e.g. “The Confederación Española de Derechas Autónomas (CEDA) was formed”. Thereafter use the abbreviation.
10. Contractions do not take a full point, e.g. Mr, St, Ltd, edn, or contracting degrees (Dr, DPhil, PhD, MSc). However, the following abbreviations take full points: No., Co., p., pp., Vol., Ch. (but use Vols and Chs), e.g., ed. (but use eds), et al., etc., i.e., cf. (note that this means ‘compare’ and not ‘see’), n.d.
11. No comma after e.g., i.e. or cf. Etc. is usually preceded by a comma in a list.
12. In reference lists, notes, footnotes and authors’ biographical notes, please use the standard abbreviated form for American states (and territories):

Alabama	AL	Indiana	IN	Nevada	NV	South Dakota	SD
Alaska	AK	Iowa	IA	New Hampshire	NH	Tennessee	TN
Arizona	AZ	Kansas	KS	New Jersey	NJ	Texas	TX
Arkansas	AR	Kentucky	KY	New Mexico	NM	Utah	UT
California	CA	Louisiana	LA	New York	NY	Vermont	VT
Colorado	CO	Maine	ME	North Carolina	NC	Virginia	VA
Connecticut	CT	Maryland	MD	North Dakota	ND	Virgin Islands	VI
Delaware	DE	Massachusetts	MA	Ohio	OH	Washington	WA
District of Columbia	DC	Michigan	MI	Oklahoma	OK	West Virginia	WV
Florida	FL	Minnesota	MN	Oregon	OR	Wisconsin	WI
Georgia	GA	Mississippi	MS	Pennsylvania	PA	Wyoming	WY
Hawaii	HI	Missouri	MO	Puerto Rico	PR		
Idaho	ID	Montana	MT	Rhode Island	RI		
Illinois	IL	Nebraska	NE	South Carolina	SC		

Statistics

d.f. (degrees of freedom)	<i>M</i> (mean)
MS (mean square)	<i>N</i> (number in sample)
NS (not significant)	<i>n</i> (number in subsample)
SD (standard deviation)	<i>p</i> (probability)
SS (sum of squares)	<i>r</i> (correlation coefficient)
<i>F</i> (<i>F</i> ratio)	

Money

1. For currency use the common symbol or abbreviation – £, US\$, AUD\$, etc. – where the quantity is stated, but not when the unit of currency is being referred to in general terms.
2. The price of oil rose to US\$25 per barrel.
3. The US dollar was at an all-time low.
4. £150m, *not* millions or mlns.

Other units

- Where units are referred to in the text in general terms, they should be written out in full; where a specific quantity is used, the abbreviated form of the unit must be used. Always use figures with the abbreviated unit and use abbreviated units wherever possible – in lists of statistics, in tables and line artwork.
- Do not mix spelt-out numbers and units: 6 cm not six cm.
- Units and numerals should have a thin space between them, i.e. 100 km, not 100km.
- Abbreviations of units are the same for singular and plural (do not add an s) and they do not take a full point.

Numbers

- Spell out numbers one to nine; for numerals 10 and over use figures.
- Use figures with percent, with units, in statistical passages, in tables, etc. Numbers, however, should be spelt out at the beginning of a sentence or the sentence should be rewritten.
- Spell out and hyphenate one-half, two-thirds, etc.
- Do not use a comma in thousands but do use one in tens of thousands and above, e.g. 5643, 1298, 14,600, 342,885, 1,000,001.
- Decimal points are never raised off the line. There is no zero needed before a point for probability and correlations where the number is always less than one.

Dates

- Write out dates as follows: 30 September 2003.
- Do not use an inverted comma in decades, e.g. 1960s, mid-1930s. Avoid 80s, etc.
- Use figures for centuries, e.g. a 21st-century dilemma.

Notes and footnotes

1. Textual notes

Textual notes are indicated by a superscript arabic numeral placed *after* the punctuation. All textual notes should be collected and placed after the text and before the reference section. Any general note, author's acknowledgment or brief statement should be the first, unnumbered note.

2. Authors' biographical notes

Follow journal style.

3. Tables and Figures

All tables and figures should be numbered consecutively and cited in the text (as Table 1, Figure 1 etc.). They should all carry brief but complete captions.

Footnotes to tables should be indicated by a superscript, lower case ^a, ^b, ^c, etc. The notes themselves should be placed at the foot of the table (below any rule) preceded by the respective superscript letter. These notes should precede the source for the table, if included.

3. OS Reference Style

3.1 Text citations

All references in the text and notes must be specified by the authors' last names and date of publication together with page numbers for direct quotations from print sources.

Do not use *ibid.*, *op. cit.*, *infra.*, *supra.*

Note the following for the style of text citations:

1. If the author's name is in the text, follow with year in parentheses:

... Author Last Name (year) has argued ...

2. If author's name is not in the text, insert last name, comma and year:

... several works (Author Last Name, year) have described ...

3. For **direct quotations**, the page number follows the year, preceded by 'p.' (not a colon):

... it has been noted (Author Last Name, year, p. xxx) that ...

4. Where there are **two authors**, always cite both names, joined by 'and' if within running text and outside of parentheses; joined by an ampersand (&) if within parenthetical material, in tables and in captions, and in the reference list:

... Author Last Name **and** Author Last Name stated that...

... it has been stated (Author Last Name **&** Author Last Name, year) ...

5. When a work has **three, four, or five authors**, cite all authors the first time the reference occurs; in subsequent citations, include only the surname of the first author followed by 'et al.' (not italicized and with a period after 'al') and the year if it is the first citation of the reference within a paragraph:

... Author Last Name, Author Last Name, Author Last Name, and Author Last Name (year) found that ,, [Use as first citation in text.] [Use ampersand if within parentheses.]

... Author Last Name et al. (year) found that [Use as subsequent citation thereafter.]

6. When a work has **six or more authors**, cite only the surname of the first author followed by 'et al.' (not italicized and followed by a period after 'al') and the year for the first and subsequent citations. (In the reference list, however, provide the initials and surnames of the first six authors and shorten any remaining authors to 'et al'.)

7. If **two references with six or more authors** shorten to the same form, cite the surnames of the first authors and of as many of the subsequent authors as necessary to distinguish the two references, followed by a comma and 'et al.'. For example:

If you have entries for the following references:

...Smith, Jones, Clark, Kumar, Green, Miller (2000)

...Smith, Jones, Miller, Green, Powell, Goggins (2000)

In the text you would cite them, respectively, as:

...Smith, Jones, Clark, et al. (2000) and Smith, Jones, Miller, et al. (2000)

8. If two or more references by the same author are cited together, separate the dates with a comma (in chronological order):

... the author has stated this in several studies (Author Last Name, 2000, 2001, 2002, 2006) ...

9. If there is more than one reference to the same author (or by the same two or more authors in the same order) and year, insert the suffixes a, b, c, etc. after the year; repeat the year. The suffixes are assigned in the reference list, where these kinds of references are ordered alphabetically by title (of the article, chapter, or complete work):

... it was described (Author Last Name, 2000a, 2000b, 2000c) ...

10. List two or more works by different authors who are cited within the same parentheses in alphabetical order by the first author's surname, separated by semicolons:

... and it has been noted (Clark, 2001; Miller, 2001) ...

Exception: You may separate a major citation from other citations within parentheses by inserting a phrase, such as 'see also' before the first of the remaining citations, which should be in alphabetical order:

... (Miller, 2001; see also Clark, 2000; Smith, 2000) ...

11. When names of groups (e.g. government agencies, universities, etc.) serve as authors, these are usually spelled out each time they appear in a text citation. However, some group authors can be spelled out in the first citation and abbreviated thereafter:

First text citation:

... (United Nations International Children's Emergency Fund [UNICEF], 2000) ...

Subsequent text citation:

... (UNICEF, 2000) ...

12. When a work has no author, cite in the text the first few words of the reference list entry and the year. Use double quotation marks around the title of an article or chapter and italicize the title of a journal, book, etc.:

... it was stated (*Name of Journal*, year) that ...

13. Citations from personal communications are not included in the reference list; cite in text only, giving the initials as well as the surname of the communicator and provide as exact a date as possible:

... (First and Last Name of Person, personal communication, April 28, 2000).

3.2 Reference list

General

1. Check that the list is in alphabetical order by surname of the first author (treat Mc and Mac alphabetically and literally, not as if they were all spelled 'Mac').
2. Names should be in initial cap then lower case.
3. Where several references have the same author(s), do not use ditto marks or em dashes; the name must be repeated each time.
4. Last Names containing de, van, von, De, Van, Von, de la, etc. should be alphabetized according to the language of origin.

5. Names containing Jr or II should be listed as follows:
Author Last Name, Full First Name (+ Initials followed by full stop for any further given names), Jr. (year).
Author Last Name, Full First Name (+ Initials followed by full stop for any further given names), II (year).
6. When ordering several works by the same first author:
- Single-author references arranged in date order, the earliest first;
 - Single-author entries precede multiple-author entries beginning with the same surname;
 - Two or more author references in alphabetical order according to the second author's last name, or if the second author is the same, the last name of the third author, and so on;
 - References with the same authors in the same order are arranged by year of publication, the earliest first:

Green, Michaela (2017)
Green, Theodora R., & Nedkowskaja, Paula (2017)
Green, Wendy (2016)
Green, Wendy (2017a)
Green, Wendy (2017b)
Green, Wendy, Huonen, Jari, & Salazar, Tiago (2017)
Green, Wendy, & Jones, Marilyn L. (2017)
Green, Wendy, Nakamura, Saki, & Lewis, Samuel (2017)
Green, Wendy, & Peters, Juliane (2016)

7. Check that all periodical data are included – volume and page numbers, publisher, place of publication, etc. **Only give the issue number in parentheses immediately after the volume number if each issue of a journal begins on page 1.**

Reference styles

Article and Book titles

Please format with an initial capital only and remaining words lower case (unless names). Run on subtitle after colon (with initial capital).

Journal article

[Author A] Last Name, Full First Name, [Author B] Last Name, Full First Name, & [Author C] Last Name, Full First Name (+ Initials followed by full stop of any further given name(s)) (year). Article title. *Journal Name*, vol no., xx–xx.

Calabretta, Giulia, Gemser, Gerda, & Wijnberg, Nachoem M. (2017). The Interplay between intuition and rationality in strategic decision making: A paradox perspective. *Organization Studies*, 38, 365–401.

Online articles

(Online journal articles or journal articles before published in print, e.g. OnlineFirst, AAM)

[Author(s) Name(s) like in Journal articles] (year). Article title. *Journal Name*. <https://doi.xxxxxxx>.

Danner-Schröder, Anja, & Ostermann, Simone M. (2020). Towards a processual understanding of task complexity: Constructing task complexity in practice. *Organization Studies*.
<https://doi.org/10.1177/0170840620941314>

Book

[Author(s) Name(s) like in Journal articles] (year). *Book title*. Location: Publisher.

Lee, Thomas W. (1998). *Using qualitative methods in organizational research*. Thousand Oaks, CA: SAGE Publications.

Chapter in book

[Author(s) Name(s) like above] (year). Chapter title. In [Editor(s)] Last Name(s), Full First Name(s) (+ Initials followed by full stop of any further given name(s) (Ed(s).), *Book title* (pp. xxx–xxx). Location: Publisher.

Orlikowski, Wanda J., & Scott, Susan V. (2016). Digital work: A research agenda. In Czarniawska, Barbara (Ed.), *A research agenda for management and organization studies* (pp. 88–95). Cheltenham, UK: Edward Elgar Publishing.