British Columbia Guide to Recovery Planning for Species at Risk

Appendix 3. Formatting Specifications for Recovery Documents

January 2023

Version 3.0

Version control

Document title: BC Guide to Recovery Planning for Species at Risk. Appendix 3. Formatting Specifications for Recovery Documents

Version #	Date posted	Updated by	Changes made
2.0	2015-05-04	RPC	
3.0	2023-01-06	RPC (Alana Phillips)	Updated: formatting, version control table, clarified wording where needed, aligned with Recovery Plan Template.

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1   INTRODUCTION

This document prescribes technical formatting standards for provincial recovery planning documents including management plans, recovery plans, and implementation plans.

The formatting specifications listed in this document have been adapted over time and align with the current versions of the recovery document templates. In additions, the format was reviewed by Government Communications and Public Engagement (GCPE) staff in Nov 2022, who provided numerous suggestions to improve readability and accessibility. These improvements have been incorporated into this specifications guide.

In case of uncertainty about formatting, please refer to the following in terms of priority:
1. **The current version of the Recovery Plan Template is essentially the Master document for all formatting standards.**
2. This document attempts to remain consistent with the Recovery Plan Template but may lag behind.
3. Examine recovery documents published in 2022 or later to determine how formatting was used in a particular situation.
4. Refer to the NRS Publication Standards and Requirements website.
5. Refer to the FOR Style Guide and Authors Manual (2016), in particular for all formatting specifications around use of numbers, abbreviations, punctuation, and grammar.

2   VERSION TRACKING

The templates provide a page immediately after the cover page with a table for tracking version numbers. Best practice is to increase the version number after each substantial change to the draft. Note who made the changes and briefly describe the changes made.

For recovery documents, remove the Version Tracking page and version table at the Approval stage of the document.

For guidance documents, leave the Version Tracking page in.

3   NAMING CONVENTIONS

3.1   Species names

Naming for all species must follow the common and scientific names as listed in the B.C. Species and Ecosystems Explorer (BCSEE).

The first time a species is mentioned in the document, both the common name and the scientific names must be reported (e.g., common name (*Scientific name*)). All further references to the species should only include the common name.

Avoid using 'the' before a species' common name (e.g., "Preferred habitat for ~~the~~ Bull Trout"; "In Canada, ~~the~~ Haida Gwaii Slug is found…")

Capitalization rules follow those shown in the BCSEE. In general, common names for plant species are in lower case (except where there is a proper noun within the species' name), while common names for animal species are in Upper Case. For example:
- slender yoke-moss
- Haida Gwaii Slug
- Douglas-fir
- whitebark pine
- Carey's small limestone moss
- 'background species': Mountain Pine Beetle, Sitka Deer, Moose, salal

3.2   Place names

When using the shorthand for British Columbia it should be B.C. throughout the document except when it refers to a specific location (e.g., Victoria, BC but B.C. Ministry of Forests) or is part of a trademark (e.g., BC Hydro).

Use Indigenous placenames with appropriate fonts and symbols as needed.
e.g., M^{q}uq^{w}in / Brooks Peninsula Park

4   FONTS AND STYLES

Use the custom Styles provided within the template for all text. Do not modify the Styles.

The **default style (Normal) for regular text is Calibri 12pt** with no spacing before/after paragraphs.. There should be no Arial or Times New Roman anywhere in the text.

When creating a new document from scratch, use the **New Blank Document** file (see the Recovery Planning Coordinator for a copy). This ensures that you have all the custom styles you'll need for your document, and prevents styles from other templates from causing formatting errors that are time-consuming to fix.

Table 1. Custom styles to be used with each type of text within the template.See Appendix A for a list of each style with their attributes.

Type of text	Style
All regular body text in document	Normal
Front cover (Title, Authors, Date)	**Title_Page 1**
Second title page (Title, Author)	**Title_Page 2**
Second title page (Date)	**Title_Page 3**
Second title page (version #)	Title_Page 4
Headings of the following preliminary pages: Acknowledgements, Executive Summary, Recovery Feasibility Summary	**FRONT HEADING**
- Headings of the following preliminary pages: About the BC Recovery Series, Disclaimer, Recommended Citation - All subheadings on preliminary pages - Titles for TOC, List of Tables, List of Figures	**Front Subheading**
Headings for main sections	**1 HEADING 1**
Headings for sub-section	**1.1 Heading 2**
Headings for sub-sub-sections	**1.1.1 Heading 3**
Minor headings within Heading 3 sections	**Heading 4**
Bulleted lists	Bullet list
Numbered lists	Number list
Recovery docs: Level 1 IUCN threats or actions	**Threat-Action Level 1**
Recovery docs: Level 2 IUCN threats or actions	<u>Threat-Action Level 2</u>
Header row of table	**Table Heading**
All text within table	Table Text
Footnotes that appear immediately after table (use a,b,c in table for footnotes)	Table footnote
All items in Reference Section	References
Headings for Appendices (use A,B,C to number appendices)	Appendix Heading
Headers and Footers include page #s	Headers and Footers
Footnotes within text	Footnote text
Table and Figure captions	Caption
Header 1 and Appendix Headers in TOC	TOC LEVEL 1
Heading 2 in TOC	TOC Level 2
Hyperlinks	[Hyperlink](#)

5   ACCESSIBILITY

Refer to the [Accessibility and Inclusion Toolkit](#) before creating any government documents or presentations.

To increase accessibility for persons with colour blindness, please consult these [Accessibility Colour Palettes](#) when building figures, tables, and graphs.

Readability of text
Use text emphases (e.g., capitals, bold, italic, underline, colours) very sparingly to maximize the the readability of a document, as follows:
- Use only black fonts.
- Use ALL CAPS for the following styles only: HEADING 1, FRONT HEADING.
- Use italics only for Scientific names (e.g. *Staala gwaii*), names of legislation (e.g. *Species at Risk Act*, but don't italicize the abbreviation SARA), and "*et al.*".
    - Note that as of Dec 2023, we are starting to receive guidance to stop using italics for legislation.
- Use underline only for Level 2 headings for IUCN threats and actions (Style: <u>Threat-Action Level 2</u>)

Tables
- Do not use vertical lines (except for IUCN Threat or Action Tables).
- Use additional spacing between rows if text is too bunched up.
- Use landscape orientation for tables that are wide or have lots of detail.

Maps and Figures
- Remove superfluous details such as: lat/long lines, small geographic features not needed to show the species' distribution (e.g., small rivers and lakes, small towns), large geographic features (e.g. mountain ranges, oceans, if not relevant to species' distribution), etc.
- Limit the use of shading – the map of B.C. should be black and white, with shading used only to show presence of species. Do not use shading for regions, oceans, rivers, etc.
- Limit the use of coloured lines and/or dotted lines.
- A good test of readability in visual images is to consider how it would look after being photocopied several times. Detail that would be lost in this scenario should not appear in the original.

6   LAYOUT

6.1   Spacing and Margins

- Use the appropriate custom Styles to ensure correct spacing before and after text and headers.

- Use a single space only after periods.
- Use the Normal (default) setting for all margins throughout the document (2.54cm/1")

6.2   Page Numbers

- Do not use page numbering on the Cover/Title pages or 'About the BC Recovery Series" page.
- Use roman numerals for numbering the preliminary pages, e.g.:
    - i Recommended Citation
    - ii Disclaimer
    - iii Acknowledgements
    - iv Executive Summary (may be 1-2 pages)
    - v Recovery Feasibility Summary (may be 1-2 pages)
    - vi Table of Contents, Lists of Tables, List of Figures (may be 1-2 pages)
- Start page numbering with regular numerals (1,2,3…) in Section 1 COSEWIC Species Assessment Information, which is usually the first page after the TOCs.

6.3   Table of Contents / Lists of Tables and Figures

All text in Tables of Contents (TOC) and List of… is Calibri 11 pt, no bold. To create the title for a new TOC or List of…, use the Style Front Subheading but change it to all caps. Templates do not include a separate List of Appendices.

The template custom TOC include two levels only, which includes the list of Appendices, as follows (see Appendix A for details):
- TOC 1: Heading 1 and Appendix Heading (ALL CAPS)
- TOC 2: Heading 2 (Regular Case)

How to create a new TOC or List of…
- Table of Contents: References|Table of Contents|Custom Table of Contents…, hit OK
- List of Tables: References|Insert Table of Figures, select Caption Label = Table
- List of Figures: References|Insert Table of Figures, select Caption Label = Figures

6.4   Tables and Figures

6.4.1   Tables

Tables should not have vertical lines (except for IUCN threat/action tables). For tables with lots of detail and/or many rows/columns, use white space to differentiate the data presented. Use landscape orientation if needed. See also notes under Accessibility above.

Table 2. This table shows the various Styles used in tables. Note that there is no space after the title line before the rest of the table. To abbreviate this title for the List of Tables, use the method listed below (to see the effect of this, see the List of Tables at the start of the document).

Table heading format[a]	Table heading format
This is table text	This is table text
More table text	More table text
Last table text	Last table text

[a] This is a table footnote. Use (a,b,c,…) instead of numbers. These don't automatically number (if they did, they would interfere with text footnotes).

6.4.2   Figures

Figures are always centred on the page. The figure caption follows immediately below the image and is left-justified. See also notes on Accessibility above for maps and graphics.
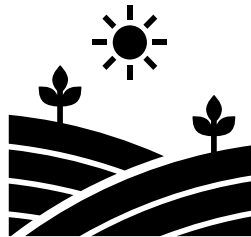

Figure 1. This figure shows how figures should be laid out within the text. Figures are always centre-justified, while the caption is left-justified.

6.4.3   Creating Table and Figure Captions (and shortening them)

To create the table or figure title, use References|Insert Caption, select Label = Table or Figure. This allows for automatic numbering of tables/figures within the document, and for the caption to be included in the List of Tables/Figures.

Sometimes table or figure titles are very long due to supporting information, long descriptions, references/source, etc. This makes them wrap untidily in the List of Tables/Figures. To abbreviate long table titles so that they fit nicely in the List of Tables/Figures:
1. Add a normal paragraph break (Enter) at the end of the text that should appear in the List of….
2. Press ← to place the cursor back at the end of the first paragraph.
3. Press Ctrl+Alt+Enter to convert the paragraph break into a style separator.
   - Note: the style separator looks like a regular paragraph icon with a dotted outline around it. It can be seen with Show Paragraph Marks on. See examples in the captions for tables and figures in this document.

6.5   Footnotes

To insert a footnote within the text of the document, use References|Insert Footnote.

To insert a footnote within a table, do this manually using the letters a,b,c to denote the footnote number, and include the table footnote immediately under the table using the Style Table Footnote.

6.6   References

6.6.1   Citations in Document

When citing authors in the text of the document, the following formatting should be used:
- (Author 1971) OR Author (1971) found…..
- (Author and Writer 1995) OR Author and Writer (1995) found…..
- (Author *et al.* 1996) OR Author *et al*. (1996) found…..
- (Writer, pers. comm., 2007) OR Writer (pers. comm., 2007) found…..
- When listing multiple references use a semi-colon between (Writer 1999; Author 1998)

6.6.2   Reference Section

Use the References Style. The basic format for References is:

Author, R.J., Writer, I.H., and Researcher, J. 2022. Main template for styles, etc. Some Journal of Typography 51:234-235 <URL> [Accessed Month DD, Year)

General formatting rules for references
- Use commas between all authors' names (including where there are only two authors, and as an oxford comma at the end of a long list of authors).
- Do not include spaces between authors' initials.
- Use only one space after any period.
- Do not use italics except for species scientific names or names of legislation.
- Do not abbreviate journal names, publishing companies, ministry names, conference dates, etc. Exceptions are province/state abbreviations, and "pp".
- Provide the full agency name in the References but OK to use the abbreviation when citing within the text, e.g., "COSEWIC (2019)" in text; "Committee on the Status of Endangered Wildlife in Canada (COSEWIC). 2019." in References.
- B.C. has periods when it appears in front of an agency or statute (e.g., B.C. Ministry of X, B.C. Conservation Data Centre, B.C. *Wildlife Act*). Use BC when it refers to a geographic location (e.g. published in Victoria, BC) (this also applies to other provinces/states, e.g., AB, WA, NY).

Web links (URLs)
- Attempt to include **URLs** for all documents except those published in peer review journals. This includes white papers, reports, government policies and guidelines, government publications, legislation, online materials including data sources.
- Use the entire URL, rather than using a shortcut link like this. This enables readers to copy/past the URL even if the PDF no longer clicks through to the web page (for example, the PDF has been printed).
- Before finalizing the document, check all URLs to ensure they still work, and update the date accessed.

References provided in the templates

The templates provide the references which have been cited in the boilerplate text. Use these as guides to formatting. You can also refer to recovery documents published in 2022 onwards as a reference for the many kinds of formatting for journal articles, books, white papers, etc.

Common examples include:

B.C. Conservation Data Centre. YEAR. BC Species and Ecosystems Explorer: Species Common Name. B.C. Ministry of Water, Land and Resource Stewardship, Victoria, BC. <[add link for specific species]> [Accessed Month ##, YEAR]

Committee on the Status of Endangered Wildlife in Canada (COSEWIC). YEAR. COSEWIC Assessment and Status Report on the Species Common Name in Canada. Ottawa, ON. # + # pp. <URL for Species Common Name – starts with https://www.canada.ca/en/environment-climate-change/services/species-risk-public-registry/cosewic-assessments-status-reports/.....> [Accessed Month ##, YEAR]

Conservation Standards. 2019. IUCN-CMP Threats and Actions Classifications (Version 2.0). <https://conservationstandards.org/library-item/threats-and-actions-taxonomies> [Accessed Month ##, YEAR]

Crown Land Registry (Tantalis). YEAR. Government of British Columbia. <https://www2.gov.bc.ca/gov/content/data/geographic-data-services/land-use/crown-land-registry> [Accessed Month ##, YEAR]

Environment and Climate Change Canada. 2020. Policy on Recovery and Survival. Species at Risk Act Policies and Guideline Series. Ottawa, ON. 7 pp. <https://wildlife-species.canada.ca/species-risk-registry/virtual_sara/files/policies/Pg-RecoverySurvivalRetablissementSurvie-v00-2021Mar-eng.pdf> [Accessed Month ##, YEAR]

Government of Canada. 2002. *Species at Risk Act* [S.C. 2002] c. 29. Justice Laws website <http://laws-lois.justice.gc.ca/eng/acts/S-15.3/page-1.html> [Accessed Month ##, YEAR]

Master, L.L., D. Faber-Langendoen, R. Bittman, G.A. Hammerson, B. Heidel, L. Ramsay, K. Snow, A. Teucher, and A. Tomaino. 2012. NatureServe conservation status assessments:

factors for evaluating species and ecosystems at risk. NatureServe, Arlington, VA. <https://www.natureserve.org/biodiversity-science/publications/natureserve-conservation-status-assessments-factors-evaluating> [Accessed Month ##, YEAR]

6.6.3 Unpublished reports and data

Unpublished material should not be listed in the References section **unless** there is a reasonable way for the public to access them. Unpublished data may be presented as an Appendix if the authors provide permission to do so.

Best practices for unpublished material:
- If the unpublished materials were produced or funded by the Province of B.C., they should be publicly available consistent with B.C.'s Open Information and Open Data Policy. In this case, authors should work with Knowledge Management Branch (KMB) to upload reports, data, and geospatial information to a database such as EIRS or EcoCat. The materials can then be listed in the References section with their publicly-available URL.
- If the unpublished material is only available from a non-government source (e.g., an ENGO or consulting company), verify the availability with the source (do they still have copies?), and provide a reasonable way for a member of the public to contact the source (e.g., the organization's website or street address with city).
- Some unpublished material is secured under the Species and Ecosystems Data and Information Security Policy and Procedures (SEDIS). The Recovery Planning Coordinator can help you if this is the case.

6.6.4 Personal Communications

Personal communications should be listed at the end of the References section, using the following format:
Last Name, First Initial, Title, Affiliation, Location

Example:
Copley, C., Senior Collections Manager, Entomology, Royal British Columbia Museum, Victoria, BC

6.7 Appendices

Add appendices as needed at the end of the document. Use letters (A,B,C) to identify and order them.

7   FURTHER RESOURCES

The following B.C. government websites provide useful guidance on writing for government.. If you cannot access a particular link, please contact the Recovery Planning Coordinator for help.

Writing resources:
- [Forest Science Program Style Guide and Authors Manual](#) (Scientific/Technical writing)
- [Scientific Research Publications](#)
- [How to Write it: MIRR Guide to Writing and Editing](#)
- [ENV Correspondence Manual](#)
- [FOR Writing Guide](#) (Correspondence/Communications)
- [Plain Language Guide](#)
- [Writing Guide for Indigenous Content](#)
- [Words Matter: Guidelines on using inclusive language in the workplace](#)
- [Web Style Guide](#)

Design and accessibility resources:
- [Visual Design Guide for Web](#)
- [Accessibility and Inclusion Toolkit](#)
- [Accessibile Colour Palettes](#)

Note: All URLs in this section were current as of January 3, 2023.

Appendix A. List of Custom Styles in Templates

Style	Where it's used	Basic attributes
Normal	All regular text	Calibri 12pt, left, single spaced, no space before/after
Title_Page 1	Front cover (Title, Authors, Date)	Calibri 18pt, bold, centred
Title_Page 2	Second title page (Title, Author)	Calibri 14pt, bold, centred, 12pt after
Title_Page 3	Second title page (Date)	Calibri 12pt, bold, centred, 12pt after
Title_Page 4	Second title page (version #)	Calibri 12pt, centred
FRONT HEADING	Headings of the following preliminary pages: Acknowledgements, Executive Summary, Recovery Feasibility Summary	Calibri 14pt, bold, left, ALL CAPS, 6pt after, appear in TOC
Front Subheading	- Headings of the following preliminary pages: About the BC Recovery Series, Disclaimer, Recommended Citation - All subheadings on preliminary pages - Titles for TOC, List of Tables, List of Figures	Calibri 14pt, bold, left, 12pt before, 6pt after, do not appear in TOC Note: for Titles for TOC, etc, use this style with ALL CAPS.
1 HEADING 1	Headings for main sections	Calibri 14pt, bold, left, ALL CAPS, 12pt before, 12pt after, Number list, indent 0.76cm, TOC Level 1
1.1 Heading 2	Headings for sub-section	Calibri 14pt, bold, left, 12pt before, 12pt after, Number list, indent 1.25cm, TOC Level 2
1.1.1 Heading 3	Headings for sub-sub-sections	Calibri 12pt, bold, left, Sentence case, 12pt before, 6pt after, Number list, indent 1.25cm, do not appear in TOC
Heading 4	Minor headings within Heading 3 sections	Calibri 12pt, bold, left, 12pt before
● Bullet list	Bulleted lists	● Indent 1.14cm
4. Number list	Numbered lists	Indent 0.5cm, hanging indent 0.63cm, tab stop 1.14cm

Style	Where it's used	Basic attributes
Threat-Action Level 1	Recovery docs: Level 1 IUCN threats or actions	Calibri 12pt, bold, left, 12pt before, 6pt after
Threat-Action Level 2	Recovery docs: Level 2 IUCN threats or actions	Calibri 12pt, left, underlined, no space before/after
Table Heading	Header row of table	Calibri 11pt, left, bold, do not spell check
Table Text	All text within table	Calibri 11pt, left
Table footnote	Footnotes that appear immediately after table (use a,b,c in table for footnotes)	Calibri 9pt, left, indent -0.2cm
References	All items in Reference Section	Calibri 12pt, left, hanging indent 1.27cm, spacing 0.8 line after
Appendix Heading	Headings for Appendices (use A,B,C to number appendices)	Calibri 14pt, bold, left, 12pt before, 6pt after, appears in TOC Level 1
Automatic styles:		
Headers and Footers	Headers and Footers include page #s	Calibri 10pt (automatic style)
Caption	Table and Figure captions	Calibri 12pt, appears in Lists of Tables/Figures (automatic style – use References – Insert Caption every time)
Footnote text	Automatically generated footnotes	Calibri 9pt
TOC LEVEL 1	Header 1 and Appendix Headers in TOC	Calibri 11pt, left, ALL CAPS, tab stops: 0.59cm, left; 16.49cm, right, leader: …..
TOC Level 2	Heading 2 in TOC	Calibri 11pt, left, indent 0.59cm, tab stops: 1.55cm, left; 16.49cm, right, leader: …..
Hyperlink	Hyperlinks	Automatic style based on whatever's 'underneath'

Known glitches with Styles:
- **Table Heading** sometimes reverts to 'not bold'
- **1. Number List** sometimes does not start new list at 1
- **Captions** are supposed to put the initial "Table X." or "Figure X." in bold and leave the text of the caption as not bold. Workaround is to make these bold after the fact.
- **Custom TOC** sometimes shows Level 3 headings. Solution: In Table of Contents properties box, change Show Levels to "2"