THESIS FORMATTING SERVICE AGREEMENT

Dated: __________________________

Between

UBC Okanagan Library
3333 University Way
Kelowna, BC V1V 1V7
ubco.thesisformatting@ubc.ca

And

College of Graduate Studies
3333 University Way
Kelowna, BC V1V 1V7

And

Supervisor (print)
Name: ____________________________________________________
Faculty: ___________________________________________________
Phone: ____________________________________________________
Email: _____________________________________________________
Address: __________________________________________________

And

Student (print)
Name:   ____________________________________________________
Faculty: ____________________________________________________
Phone: _____________________________________________________
Email: ______________________________________________________

1. Definitions:

a) **UBC:** The University of British Columbia

b) **Term of Agreement:** This agreement expires when the thesis formatting service is completed as specified in the Thesis Formatting Service Agreement (the “Agreement”). See approved Fee Structure in **Appendix A & B**.

c) **Thesis/Dissertation (Thesis):** The document provided by the Student to the Library for formatting. It is an MS Word 7 (or later) document that utilizes the template provided by the College of Graduate Studies. The term “thesis” is used collectively to refer to both master’s theses and doctoral dissertations.

d) **Copyrighted Work:** Any original literary, dramatic, musical and/or artistic work including without limitation computer programs, translations, annotations, and compilations of works, in which copyright subsists, unless copyright in such work has expired in accordance with the Copyright Act.
OBLIGATIONS OF THE LIBRARY

2. The Library staff member will perform a component review (Appendix F), complete specific formatting (Appendix G), and flag third party material lacking copyright permission statements (Appendix H). Appendix E details what this Agreement does not cover.

3. The Library will charge for formatting the Thesis to conform to the specifications provided by the College of Graduate Studies (the approved thesis template format). Formatting will be done by a Library staff member. At all times, the Thesis document and materials, research and results will be kept confidential.

4. Service Standard: The Library commits to returning the formatted Thesis to the student within 21 days (15 work days) from date of submission of Thesis and signed Agreement into UBC Workspace 2.0 – Self Service Portal (see paragraph 10).

5. When the fee is paid in full, the reviewed and formatted Thesis will be released to the Student via the UBC Workspace 2.0 – Self Service Portal (https://files.workspace.ubc.ca).

6. If the Student makes further changes or revisions to the Thesis after the fee has been paid and the Thesis released to the Student, then a new signed Agreement and fee will be required.

7. Appendix A sets out the terms of the agreement on fees and timelines. Appendix B sets out the terms of the agreement on formatting after Defense. Appendix C provides a sample invoice.

OBLIGATIONS OF THE COLLEGE OF GRADUATE STUDIES

7. The College of Graduate Studies will provide the approved thesis template format for students to use. See Appendix D for the current template.

OBLIGATIONS OF THE SUPERVISOR

8. The Supervisor acknowledges that the Student will be using the Thesis Formatting Service as identified in this Agreement.

OBLIGATIONS OF THE STUDENT

9. The Student will contact the Library via ubco.thesisformatting@ubc.ca to let them know they are interested in using the thesis formatting service. All contact with the Library regarding this service will be directed to this email.

10. The Student will use UBC Workspace 2.0 – Self Service Portal (https://files.workspace.ubc.ca) to provide a signed copy of this Agreement and the Thesis document on the template provided by the College of Graduate Studies.

11. The Student accepts there is a fee for this service, as identified in Appendix A & B, and agrees
to pay that fee in accordance with the terms of this Agreement. Acceptable forms of payment are: Cash, Debit, and Cheque.

ACKNOWLEDGEMENT

I have read, understand and accept the terms of this Agreement:

Student

_________________________________ __________________________
Name  Date of Acceptance

Supervisor

_________________________________ __________________________
Name  Date of Acceptance

UBC Okanagan Library

__________________________________ __________________________
Lois Marshall, Manager, Planning and Operations  Date of Acceptance

College of Graduate Studies

___________________________________ __________________________
Deanna Roberts, Director, College of Graduate Studies  Date of Acceptance
APPENDIX A: FEE STRUCTURE

Details of Thesis/Dissertation

<table>
<thead>
<tr>
<th>TITLE</th>
<th>NO. OF TABLES</th>
<th>NO. OF FIGURES</th>
<th>NO. OF ILLUSTRATIONS</th>
<th>LENGTH (PAGES)</th>
<th>DEFENSE DATE KNOWN?</th>
<th>Y / N</th>
<th>Date:</th>
</tr>
</thead>
</table>

Hourly Rate: $40/hour. Thesis formatting is approved for the following:

<table>
<thead>
<tr>
<th>APPROVED UP TO NUMBER OF HOURS</th>
<th>AMOUNT ($)</th>
<th>SELECT ONE</th>
<th>STUDENT INITIALS</th>
</tr>
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<tbody>
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<td>720</td>
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</tr>
<tr>
<td>20</td>
<td>800</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Other: __________

Approved to Maximum Fee of (enter dollar value approved) $ 

The document has been reviewed by Library staff.

We agree with the estimated No. of Hours above.

We DO NOT agree with the estimated No. of hours above:

- Estimated No. of Hours to complete formatting: __________
- Formatting to be completed by: ____________ [date]
- Student agrees to the Revised No. of Hours at Hourly Rate.

If it becomes apparent that the estimate is grossly inadequate once the work has started, the Library staff will immediately cease work and contact the Student to review and revise the estimate.
**APPENDIX B: REVISIONS AFTER DEFENSE**

**Hourly Rate:** $40/hour. Thesis formatting is approved for the following:

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<th>AMOUNT ($)</th>
<th>SELECT ONE</th>
<th>STUDENT INITIALS</th>
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<tr>
<td>Other: _______</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

Approved to Maximum Fee of (enter dollar value approved) $ __________

The document has been reviewed by Library staff.

We agree with the estimated No. of Hours above.

We DO NOT agree with the estimated No. of hours above:

- Estimated No. of Hours to complete formatting: _________
- Formatting to be completed by: __________ [date]
- Student agrees to the Revised No. of Hours at Hourly Rate.

Student Initial
APPENDIX C: SAMPLE INVOICE

THE UNIVERSITY
OF BRITISH COLUMBIA

UBC Okanagan Library
UB 3108 - 3287 University Way
Kelowna, BC, Canada V1V 1V7

In Account With:                      Invoice #                  OKK18-T-01
Student Name
Address

Invoice

INVOICE

Thesis Formatting Service Agreement No. xxx

Approved Amount per Appendix A: 2 hrs at $40 / hour

Total Amount Due: $80.00 CAD

cc:

Payment is due within 30 days from invoice date.

Formatted Thesis will be released to the Student when payment is made in full.

Acceptable forms of payment:

Cash
Debit
Cheque (made payable to University of British Columbia, Okanagan Library)

Please make all cheques payable to "The University of British Columbia, Okanagan Library" and remit payment to: UBC Okanagan Finance, ADM 006 - 1137 Alumni Avenue, Kelowna BC, V1V 1V7, along with a copy of this invoice, or reference to invoice number.

UBC GST Registration No. #108161779RT0001 UBC
PST Registration No. #PST-1000-7572
"This service is exempt from GST/PST"

Please direct all queries regarding this invoice to Lois Marshall.
Tel: 250.807.8545
Email: lois.marshall@ubc.ca
APPENDIX D: THESIS TEMPLATE

The College of Graduate Studies provides the approved thesis template format for students to use. This template is designed in MS Word for PC or Mac use.

The template is located under Thesis Preparation Resources on the UBC Okanagan College of Graduate Studies website. Other resources available include guidelines for formatting and sample pages.

APPENDIX E: NOT COVERED IN THIS SERVICE AGREEMENT

The Library DOES NOT review the following:

- Writing content (e.g., spelling, punctuation, grammar, style, etc.)
- Research content
- Reference style (e.g., in-text citations, reference list or bibliography items, etc.)
- Right to privacy or confidentiality breaches
- Inclusion of confidential or proprietary information belonging to others
- Inclusion of plagiarized or copyright infringing material
- Inclusion of libelous or unlawful statements
# APPENDIX F: COMPONENT REVIEW CHECKLIST

<table>
<thead>
<tr>
<th>ORDER OF COMPONENTS</th>
<th>CHECKED</th>
<th>CORRECTED</th>
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<tbody>
<tr>
<td>1 Title Page</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Committee Recommendation Form</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 Abstract</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 Lay Summary</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5 Preface</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 Table of Contents</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7 List of Tables</td>
<td></td>
<td></td>
</tr>
<tr>
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<td>9 List of Illustrations</td>
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</tr>
<tr>
<td>10 Lists of Symbols, Abbreviations or Other</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11 Glossary</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12 Acknowledgements</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13 Dedication</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14 Introduction</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15 Research Chapters (Body)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16 Conclusion</td>
<td></td>
<td></td>
</tr>
<tr>
<td>17 Bibliography/References</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18 Appendices (List:__________________)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## APPENDIX G: FORMATTING

### GENERAL FORMATTING

- Left margins are 1.25" or 1". Right, top and bottom margins are 1" or 0.75"
- Fonts are 10, 11 or 12 point in size and consistent
- Paragraphs are indented consistently throughout
- Text appears in a single column on each page and is double-spaced (except for blocked quotations, notes, captions, legends, and long headings, which are single-spaced)
- Document text is left-justified
- All page numbers are at the bottom of the page, 1/2" from the bottom edge
- Pages do not contain running headers or footers, aside from page numbers
- Landscape pages are correctly placed
- Formatting for tables, figures, and illustrations is consistent throughout the entire document
- Headings and captions for the associated item are on the same page
- Sections and subheadings within chapters are not left hanging indent on the bottom of pages

Comments: ____________________________________________________________

### TITLE PAGE

- Title in all capital letters and centered
- Full name centered 1" below the title
- Correct format for academic credentials or previous credentials
- Degree name and faculty, centered 1" below name
- Campus name indicated
- Name and copyright symbol followed by year at foot of page
- No page number (even though it counts in numbering)

Comments: ____________________________________________________________

### PRELIMINARY PAGES

- The abstract, lay summary, dedication, acknowledgement(s) and preface each begin on a new page
- The abstract text does not exceed 350 words
- The lay summary does not exceed 150 words
- Pages are numbered in lower case Roman numerals

Comments: ____________________________________________________________
TABLE OF CONTENTS

- One double-spaced line between the heading and the first entry
- Each entry is aligned with the document’s left margin or indented to the right of the left page margin using consistent tabs
- Major subheadings within chapters are listed and indented to the right of the left page margin
- All corresponding page numbers are accurate with leaders between title and the page number
- The last digit of each page number lines up on the right margin
- Information included in the table of contents matches the headings, major subheadings, and numbering used in the body of the document
- Pages are numbered in lower case Roman numerals

Comments: ___________________________________________________________________________________

LISTS OF TABLES, FIGURES, ILLUSTRATIONS

- One double-spaced line between the heading and the first entry
- Each entry is single-spaced, with a double space between entries
- Each entry includes a number, title, and page number
- Each table, figure, or illustration has been assigned an Arabic numeral
- Numerals and titles align with the left margin or are indented to the right of the left page margin using consistent tabs
- All corresponding page numbers are accurate, with leaders between title and the page number; the last digit of each number lines up on the right margin
- Numbers, titles, and page numbers match the corresponding information as it appears in the document

Comments: ___________________________________________________________________________________

LISTS OF ABBREVIATIONS, SYMBOLS

- One double-spaced line between the heading and the first entry
- Each entry is single-spaced, with a double space between entries
- Abbreviations are arranged alphabetically
- Each entry is aligned with the document’s left margin or indented to the right of the left page margin using consistent tabs
- Pages are numbered in lower case Roman numerals

Comments: ___________________________________________________________________________________
Footnotes

- Footnotes are placed at the bottom of the page and are separated from the text by a solid line 1” to 2”
- Footnotes begin at the left page margin, one single-spaced line below the solid line
- One double-spaced line between footnotes
- All notes are numbered with Arabic numerals consecutively within each chapter, starting over with number 1 for the first note in each chapter, or notes are numbered consecutively through the entire document

Comments: 

Endnotes

- Endnotes always begin on a separate page either immediately following the end of each chapter, or at the end of the entire document
- If endnotes are placed at the end of the entire document, they appear immediately before the references
- One double-spaced line between notes
- Longer notes are single-spaced between lines
- All notes are numbered with Arabic numerals consecutively within each chapter, starting over with number 1 for the first note in each chapter, or notes are numbered consecutively through the entire document
- Numbers precede the note, are superscripted (placed slightly above the line), and no space is placed between the number and the note

Comments: 

References

- References begin on a separate page at the end of the entire document before the Appendices
- Appropriate heading at the top of the page (e.g., “REFERENCES”, “BIBLIOGRAPHY”, or “WORKS CITED”)
- Page numbering continues consistently throughout the references section(s)

Comments: 

Appendices

- All appendices appear at the end of the document following the references
- For one appendix use the heading “APPENDIX”; for multiple appendices assign each appendix a number or letter heading (APPENDIX 1 or APPENDIX A)
- Page numbering continues consistently throughout the appendix or appendices

Comments:
APPENDIX H: COPYRIGHT FLAGGING

The Student is solely responsible for ensuring that the thesis complies with Canadian copyright law and that all Copyrighted Work has accurate permission statements and citations. For more information about copyright and theses, visit [http://copyright.ubc.ca/guidelines-and-resources/support-guides/theses-and-dissertations/](http://copyright.ubc.ca/guidelines-and-resources/support-guides/theses-and-dissertations/)

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## Document Control

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