



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

TITLE				
NO. OF TABLES				
NO. OF FIGURES				
NO. OF ILLUSTRATIONS				
LENGTH (PAGES)		DEFENSE DATE KNOWN?	Y / N	Date:

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

APPROVED UP TO NUMBER OF HOURS	AMOUNT (\$)	SELECT ONE	STUDENT INITIALS
2	80		
4	160		
6	240		
8	320		
10	400		
12	480		
14	560		
16	640		
18	720		
20	800		
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.

Library initial

Library initial

Library initial

Library initial

Student Initial

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:

APPROVED UP TO NUMBER OF HOURS	AMOUNT (\$)	SELECT ONE	STUDENT INITIALS
2	80		
4	160		
6	240		
8	320		
10	400		
12	480		
14	560		
16	640		
18	720		
20	800		
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.

Library initial

Library initial

Library initial

Library initial

Student Initial



APPENDIX C: SAMPLE INVOICE



THE UNIVERSITY OF BRITISH COLUMBIA

UBC Okanagan Library
LIB 310B - 3287 University Way
Kelowna, BC, Canada V1V 1V7

In Account With:

Invoice #
Invoice date

OKLIB-T-01

Student Name
Address

INVOICE

Thesis Formatting Service Agreement No. xxx

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

Total Amount Due \$80.00 CAD

SAMPLE

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

	ORDER OF COMPONENTS	CHECKED	CORRECTED
1	Title Page		
2	Committee Recommendation Form		
3	Abstract		
4	Lay Summary		
5	Preface		
6	Table of Contents		
7	List of Tables		
8	List of Figures		
9	List of Illustrations		
10	Lists of Symbols, Abbreviations or Other		
11	Glossary		
12	Acknowledgements		
13	Dedication		
14	Introduction		
15	Research Chapters (Body)		
16	Conclusion		
17	Bibliography/References		
18	Appendices (List: _____)		



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: _____



Document Control

VERSION	ISSUED FOR	DATE
A	Initial comment	20170801
B	Further comment	20170901
C	LW final revisions	20170911
O	Document released for pilot	20170914
OA	Updated usb vs Workspace, insert section on revisions when completed no more changes without new contract, and designates.	20171207
OB	Updated for lay summary	20171208
OC	Addendum for work after Defense, defined Service Standard, added "Defense date known?" to Fee page, link to template	20180214