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**CONTENT AND FORMATTING GUIDELINES FOR  
SCIENTIFIC / TECHNICAL REPORTS**

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**SCIENTIFIC / TECHNICAL REPORTS**

These reports present relatively large amounts of information, typically in the form of data and analyses of data. Generally, this type of report must be used for any project that includes a work element for data analysis/interpretation ([WE# 162](#)) or for developing RM&E methods and designs ([WE# 156](#)). Projects that merely collect/generate/validate data ([WE# 157](#)), without analyzing it, may use this type of report if substantial amounts of data were being summarized, especially if those data were not readily accessible to users via on-line databases or if the data are the basis for significant conclusions/recommendations in the report. Technical reports are relatively all-encompassing (spanning the scope of the contract/project), detailed, formal, and often structured according to a prescribed format.

There are at least two basic formats for technical reports: scientific and Statement of Work (SOW)-based. The primary distinctions that determine which of the two formats is better are 1) the importance of methods used to collect and analyze data – that is, how the work was performed – for understanding the results and 2) how coherent (or well integrated) the contract’s activities are toward a single purpose/result. The two basic formats are:

- **Scientific:** This format is favored when it’s important to understand methods and when the contract’s activities are well-integrated. This format employs the sections/chapters prescribed for scientific journal articles (see [standard content requirements<sup>1</sup>](#)). These general requirements are as follows:

- |            |               |             |                  |                  |
|------------|---------------|-------------|------------------|------------------|
| •Title     | •Abstract     | •Methods    | •Acknowledgments | •Tables          |
| •Authors   | •Introduction | •Results    | •References      | •Figure captions |
| •Addresses | •Study area   | •Discussion | •Text footnotes  | •Figures         |

The focus of the scientific format is on the overall results of the contract/project. It works best when the contract’s activities are coherent so that early sections of the report lead linearly and cleanly toward a conclusion. On the down-side, this format can make it easy to omit important information regarding some activities in the Statement of Work (SOW), and using this format does not sanction such omission. Progress reports that are a collection of manuscript-like chapters – such as papers presented to professional meetings – often have significant gaps in coverage and lack a unifying synthesis. Reports in scientific format do not necessarily have to report detailed, comprehensive results each year, and they could comprise a collection of individual reports accompanied by a unifying synthesis.

- **SOW-based:** This format follows primarily the objectives, work elements, or other major components of the SOW. It is a direct expansion/elaboration of the SOW and status reports. The focus of this format is on how well the required parts of the SOW were (or were not) completed, although it need not be structured rigidly according to the SOW. It works better than the scientific format when the SOW includes activities that are not very closely related.

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<sup>1</sup> Transactions of the American Fisheries Society

# BPA FISH AND WILDLIFE REQUIREMENTS FOR PUBLICATIONS AND REPORTS

## FORMATTING REQUIREMENTS FOR SCIENTIFIC / TECHNICAL REPORTS

### 1. Page Appearance and Margins:

- Single column pages. **Exception:** paragraphs with text wrapping for inserted graphics
- Text margins from page edge: 1 inch min., 1.25 inches max.
- Header, footer, and page number margins: 0.25 inch min. from text, 0.5 inch min. from page edge.

### 2. Font type and size (body text): Arial or Times New Roman; 10 pt. min.-12 pt. max. with consistent font usage throughout the document.

### 3. Properly sequenced page numbers. Consistent alpha/numeric numbering format<sup>2</sup> used continuously on all pages within the main body of text.

- **Cover and Title pages are not numbered.**
- **Appendices page numbers** can either be: **a)** continued from the main text or **b)** treated as separate sections and numbered appropriately [e.g., A-1, A-2, etc.]. Page number format must be consistent for all appendices.

### 4. All graphics (photos, drawings, blueprints, etc.) appropriately **identified** with a **title/label** on the **same page as the graphic.** Page numbers are not required to be printed on full-page graphics; however, pages must be either included in the overall page numbering<sup>3</sup>; OR the graphics are referenced as “following page XX” in the table of contents

## All reports must have a :

### 5. Title Page in standard format that includes:

- An appropriate and consistently named **Title<sup>4</sup> / Subtitle<sup>5</sup>**
- Both the **project number** and the **contract number** in the following formats  
projects are 9 digits ####-###-##                      contracts are 8 digits 000#####
- **Reporting Period<sup>6</sup>** - begin month and year to end month and year (day optional)
- **Author(s) and Author Association** (agency, company, etc., with city and state) in the order they are to be cited

**Title pages should NOT include:** street addresses, email addresses, or phone numbers.

- **Publication date** - Month (non numeric<sup>6</sup>) and year document is submitted to BPA

## Any report in excess of ten pages must also include:

### 6. A Table of Contents identifying sections, graphics, tables, and appended data (i.e., appendices) and

### 7. An Abstract and/or Executive Summary

**Cover pages are optional.** [A BPA publications cover page and citation page will be added to all documents before posting to the Web site].

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<sup>2</sup> If the main body includes distinct sections, sectional page numbering **may** be used [e.g., section 1 page 1-1, 1-2, 1-3, ..., section 2 page 2-1, 2-2... ,etc.].

<sup>3</sup> e.g., text pages 1 through 26 are followed by graphic page, which would be considered page number 27, and the following text page number would be 28

<sup>4</sup> Reports that are annual or published in a series for a project or contract should have the same title

<sup>5</sup> Subtitles identify variations in serial publication content (specific topics, locations, etc.)

<sup>6</sup> e.g., May 2004 - April 2005

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**ELECTRONIC FILE FORMATTING REQUIREMENTS**

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**All reports/documents submitted<sup>7</sup> must:**

1. meet DOCUMENT FORMATTING REQUIREMENTS,
2. be in **portable document format (pdf)**. The file must be a '**searchable text**' pdf with **full access**. Only the following security settings are permitted:

<b>User Password:</b> <b>No</b> <b>Master Password:</b> <b>Optional</b> [May be used only if the other security setting requirements are met] <b>Printing:</b> <b>Fully Allowed</b> <b>Changing the Document:</b> <b>Optional</b> [see Master Password]	<b>ContentCopying or Extraction:</b> <b>Fully Allowed</b> Authoring Comments and Form Fields: [Not applicable] FormField Fill-in or Signing: [Not applicable] <b>ContentAccessibility Enabled:</b> <b>Fully Allowed</b> <b>DocumentAssembly:</b> <b>Fully Allowed</b>
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**NOTE:** To assure accuracy and appearance of headings, page orientation, graphic placement, fonts, and tables, etc., the **complete report/document** (including any spreadsheets, graphs, maps, pictures, etc.) **should be assembled in the word processing application** (Word, Word Perfect, PageMaker, etc.) **as a single electronic file** using proper formatting techniques<sup>8</sup> **before converting it to a portable document format (pdf) file.**<sup>9</sup>

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<sup>7</sup> Uploaded on-line or delivered on a CD

<sup>8</sup> e.g., inserting page breaks rather than paragraph returns to define a new page

<sup>9</sup> If graphics or other pages/sections are to be inserted into the final portable document format (pdf) document, then special consideration should be given to the accuracy of page numbering and table of content references.

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## CONTENT AND FORMATTING GUIDELINES FOR NON-TECHNICAL PROGRESS REPORTS

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### NON-TECHNICAL PROGRESS REPORTS

In the past, BPA required annual progress reports to document of project accomplishments. As the Program has adopted Pisces<sup>10</sup> status reporting based on contract milestones and deliverables, BPA can now publish aggregate, project-level versions of these reports<sup>11</sup>, thus reducing the need for contractors to create separate annual progress reports. (Contractors should confer with their BPA project managers and/or COTRs -- Contracting Officer's Technical Representatives -- to determine what kind of report, if any, will be required beyond Pisces status reports.)

However, in many cases, there is a need to report results or conclusions that cannot be adequately captured by Pisces status reports alone. In such cases, a **non-technical posted report** may be appropriate. This type of report satisfies situations in which some additional information should be documented, but an extensive scientific or technical document would not be necessary. Non-technical reports will be uploaded to Pisces by the contractor and then made available to the public via BPA's [publications search](#) page.

- A non-technical posted report may be used when:
  1. Pisces status reporting alone does not allow important results from a contract/project to be documented. These results may include lessons learned, tabular summaries of simple monitoring results (e.g., for HIP BO), photos, etc.
  2. The extra documentation of results is so technically simple that a technical publication is not warranted. Assessing technical simplicity/complexity may require some subjective judgment. Generally, this type of report could be used for any project, except those that use a work element for data analysis/interpretation ([WE# 162](#)) or a work element for developing RM&E methods and designs ([WE# 156](#)).

**No format is prescribed for non-technical reports at this time.** They do not have to use a scientific format, but they should be rationally organized to facilitate public comprehension. The most important consideration is that the report completely cover activities in the scope of work whose results are not sufficiently presented in the Pisces status reports.

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<sup>10</sup> Pisces is BPA's project management software tool for fish and wildlife projects

<sup>11</sup> Project status reports are available on our [Fish and Wildlife Program Report Center](#).