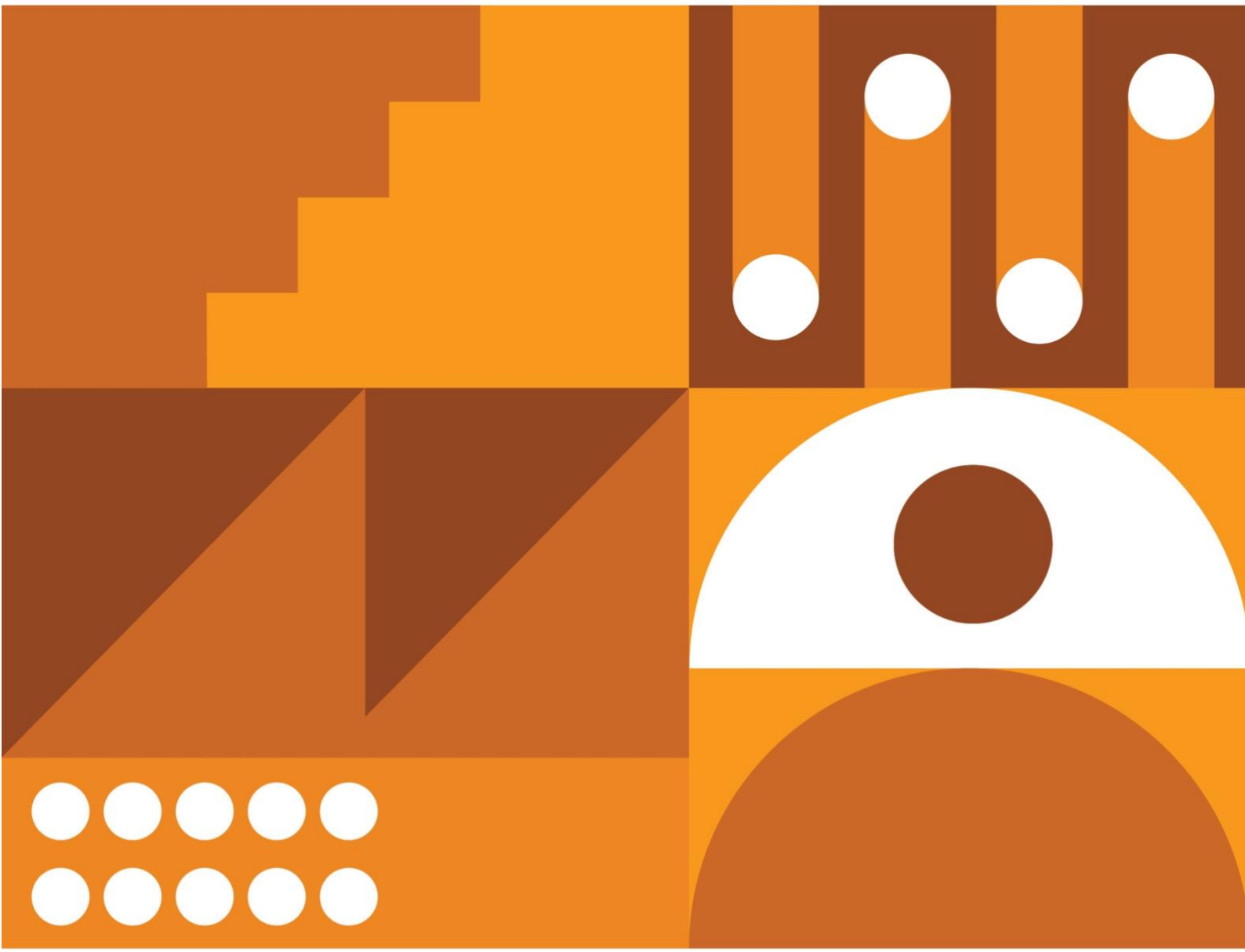
September 2024

McGuinness Institute

1. Citation and referencing protocol for *Nation Dates*

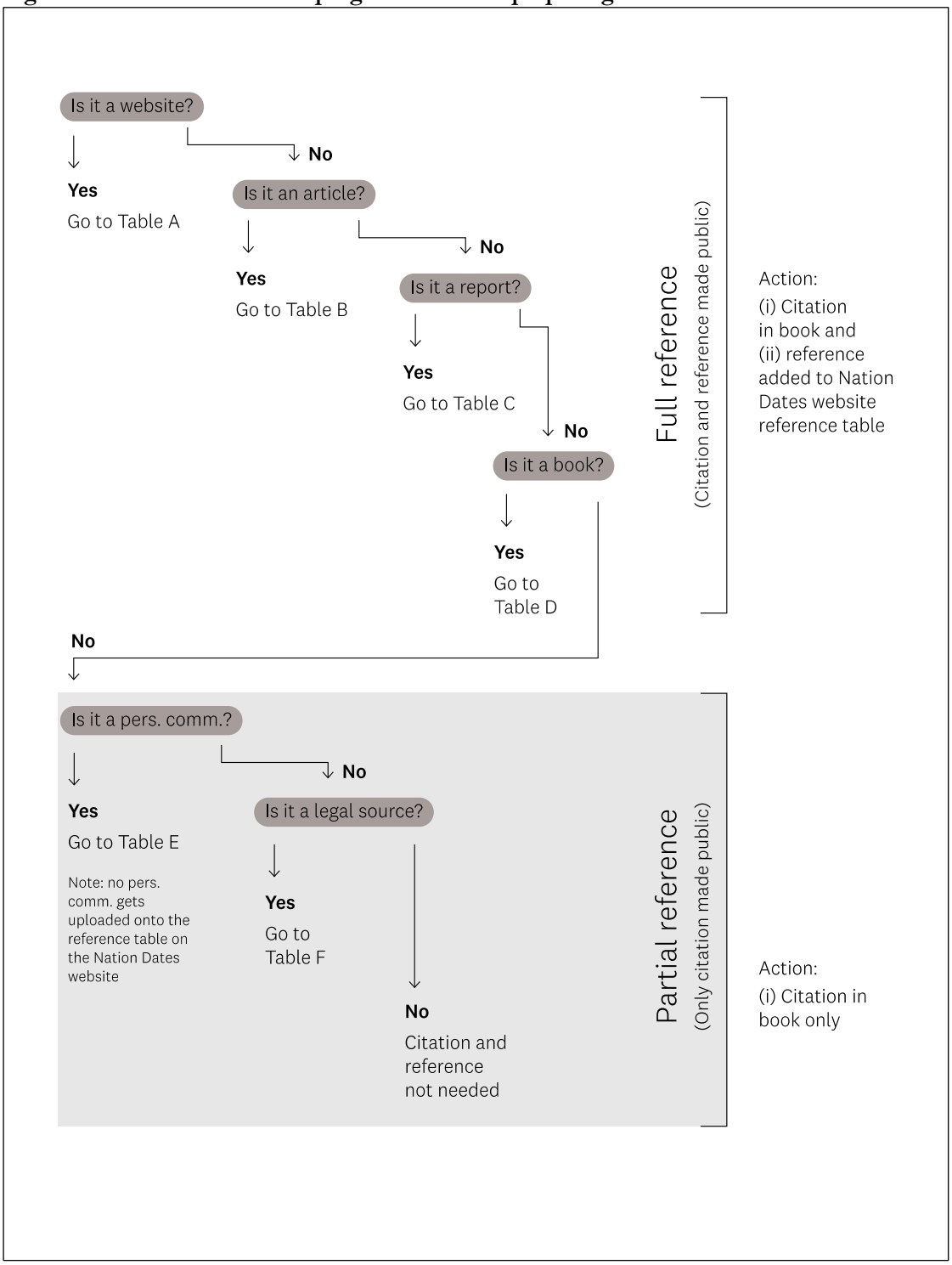


MCGUINNESS INSTITUTE
TE HONONGA WAKA

Introduction

Figure 1 below shows the Institute's system for developing citations and preparing references for evidencing our entries in *Nation Dates*.

Figure 1: Flowchart for developing citations and preparing references



All citations in the book with brackets, other than personal communications, must be in the *Nation Dates* website reference tables. All references on the website tables must be included in the hard-copy folders.

Table A: Websites and web pages		
Type	**Citation in book and on website**	**Reference on *Nation Dates* website**
Website (known author)	(Author surname, initials., YYYY) Example: (Atkinson, N., 2017)	Author, A. (DD Month YYYY [publication date or last update]). Title of web page. Website. Retrieved DD Month YYYY from URL [see PDF here] Example: Nathan, S. (2009b). West Coast Places – Reefton. Te Ara – The Encyclopedia of New Zealand. Retrieved 10 November 2020 from teara.govt.nz/en/west-coast-places/page-5 [see PDF here] Notes: Do not italicise the title of the web page or website. Web pages also do not have page numbers. Ensure that URLs given for websites and web pages do not contain search string text (a combination of text, numbers or special characters that is entered into a search engine to locate specific information). Most of the time this can be removed but if it cannot, use the URL you have. When a website says it has been 'updated' on a certain date, use this over the original publishing date and state 'Updated' before the date. Example: Nathan, S. (Updated 2009). West Coast Places – Reefton. Te Ara – The Encyclopedia of New Zealand. Retrieved 10 November 2020 from teara.govt.nz/en/west-coast-places/page-5 [see PDF here]
Website (no known individual author)	(Publisher or sponsor of the site, YYYY) Example: (MCH, 2022)	Publisher or sponsor of the site (DD Month YYYY [publication date or last update]). Title of web page. Retrieved DD Month YYYY from URL [see PDF here] Example: Ministry for Culture and Heritage (MCH) (9 February 2022). Te Wiki o te reo Māori – Māori Language Week: page 6 – Waitangi Tribunal claim. Retrieved 30 June 2023 from nzhistory.govt.nz/culture/maori-language-week/waitangi-tribunal-claim [see PDF here]

Table B: Articles		
Type	**Citation in book and on website**	**Reference on *Nation Dates* website**
News article (known author)	(Author surname, initials., YYYY) Example: (Bayer, K., 2023)	Author, A. (DD Month YYYY). Title of article. *Title of Newspaper/organisation*. Retrieved DD Month YYYY from URL [see PDF here] Examples: Bayer, K. (4 February 2023). Kiwi killed in Ukraine: New details of friendly fire incident. *New Zealand Herald*. Retrieved 11 July 2023 from www.nzherald.co.nz/nz/kiwi-killed-in-ukraine-new-details-of-friendly-fire-incident-before-foreign-units-luck-ran-out/E5GZ3GFYF5DZ3LFONC3VVFCKCI [see PDF here] Smith, A. (24 March 2023b). High Court rules decision to allow British anti-transgender activist Posie Parker into country was lawful. Radio New Zealand. Retrieved 1 May 2023 from www.rnz.co.nz/news/national/486618/high-court-rules-decision-to-allow-british-anti-transgender-activist-posie-parker-into-country-was-lawful [see PDF here]
News article (no known author)	(News agency, YYYY) Example: (RNZ, 2017)	*Title of publication/organisation*. (DD Month YYYY). Title of article. Retrieved DD Month YYYY from URL [see PDF here] Example: Radio New Zealand (RNZ) (30 June 2017). NZ to keep eight police in Solomons post RAMSI. Retrieved 4 February 2020 from www.rnz.co.nz/international/pacific-news/334160/nz-to-keep-eight-police-in-solomons-post-ramsi [see PDF here] Example: *The Economist* (26 October 2017). The world's youngest female leader takes over in New Zealand. Retrieved 21 September 2023 from www.economist.com/asia/2017/10/26/the-worlds-youngest-female-leader-takes-over-in-new-zealand [see PDF here]
Academic journal or magazine article	(Author surname, initials., YYYY) Example: (Geddis, A., 2015)	Author, A. (DD Month YYYY). Title of article. *Title of journal*, *volume*(issue), xx–xx. Retrieved DD Month YYYY from URL [see PDF here] Example: Geddis, A. (2015). Aid in Dying in the High Court: Seales v Attorney General. *Policy Quarterly*, *11*(3), 27–29. Retrieved 6 March 2017 from www.wgtn.ac.nz/igps [see PDF here]
Press/media release	(Author surname, initials., YYYY) Example: (Sepuloni, C., 2020)	Author, A. (DD Month YYYY). Title of press/media release [press release]. Retrieved DD Month YYYY from URL [see PDF here] Example: Sepuloni, C. (20 February 2020). Social Wellbeing Agency replaces Social Investment Agency with new approach [press release]. Retrieved 18 September 2023 from www.beehive.govt.nz/release/social-wellbeing-agency-replaces-social-investment-agency-new-approach [see PDF here]
Speech/ public lecture/ presentation	(Author surname, initials., YYYY) Example:	Author, A. (DD Month YYYY). Title of speech [speech/public lecture/presentation]. Retrieved DD Month YYYY from URL [see PDF here]

	(Ardern, J., 2021)	Example: Ardern, J. (4 September 2021). Prime Minister's update on the 3 September Auckland Terrorist Attack [speech]. Retrieved 23 November 2022 from www.beehive.govt.nz/speech/prime-minister%E2%80%99s-update-3-september-auckland-terrorist-attack [see PDF here] Note: This source type will often come from the Beehive website. In the square brackets, give the type of source (i.e. speech OR public lecture OR presentation).

Table C: Reports		
Type	**Citation in book and on website**	**Reference on *Nation Dates* website**
Report or publication primarily found online (including Select Committee Reports)	(Author surname, initials., YYYY) Example: (Joseph, P. A., 2008)	Author, A. (DD Month YYYY). *Title of report/publication*. Location: Publisher, pp. xx–xx. Retrieved DD Month YYYY from URL [should be the page that has the report on it] [see PDF here] Example: Joseph, P. A. (2008). *Working paper 2: The Māori seats in Parliament*. Wellington: New Zealand Business Roundtable, p. 8. Retrieved 10 September 2009 from www.nzbr.org.nz [see PDF here] Note: Most reports that are referenced in *Nation Dates* have corporate authors (e.g. a Ministry). In these cases use the organisation as the author and do not include the location and publisher in the reference. Example: Ministry of Health (MOH) (2020b, June). *The National Asset Management Programme for district health boards: Report 1 - The current-state assessment*, p. 5. Retrieved 2 November 2023 from www.health.govt.nz/publication/national-asset-management-programme-district-health-boards-report-1-current-state-assessment [see PDF here] Where specific section(s)/page(s) are cited, include the page number(s) in the citation and reference list. The page numbers always go directly before the retrieval date. Do not cite page numbers if the majority of pages in a source are used or the source does not have numbered pages. Some sources independently number different sections of a single publication. For example, the NZX Listing Rules has page numbers for the main body of the document (starting from page 1), and then restarts the numbering for its Appendix (from page 1 as well). In cases like this, we need to be more specific about the part of the document we are referring to, and specifically indicate the section, e.g. section 1, pp. 23–25, or Appendix 1, p. 4.
Cabinet paper	(Cabinet Office, YYYY) Example: (Cabinet Office, 2021)	Cabinet Office (DD Month YYYY). Committee identifier-Year-Document type-Numerical identifier: *Title of report/publication* [Cabinet paper]. Retrieved DD Month YYYY from URL of PDF. [see PDF here] Example: Cabinet Office (2021). CAB-21-SUB-0434: *Agreement to update New Zealand's first Nationally Determined Contribution under the Paris Agreement* [Cabinet paper]. Retrieved 15 August 2023 from www.environment.govt.nz/assets/publications/2-Cabinet-Paper-Agreement-to-Update-New-Zealands-First-Nationally-Determined-Contribution-NDC1-under-the-Paris-Agreement.pdf [see PDF here] Note: Cabinet documents can be difficult to reference. Often Cabinet numbers are missing from the document, or the document type is not clear. If Cabinet numbers are missing from the document, contact DPMC and ask for the Cabinet number. Refer to the DPMC's website and Law Style Guide for further information on how to cite Cabinet documents: www.lawfoundation.org.nz/style-guide2019/chapter-pt.5.2.html#5.2 www.dpmc.govt.nz/publications/cabinet-material

Thesis	(Author surname, initials., YYYY)	Author, A. (YYYY). *Title of thesis* [Doctoral dissertation or master's thesis or honours dissertation, name of university, city, country]. Retrieved DD Month YYYY from URL [see PDF here] Note: An example of this does not currently exist in *Nation Dates* 5th ed. Example: Miller, T. (2019). Enhancing readiness: An exploration of the New Zealand Qualified Firefighter Programme [Master's thesis, Auckland University of Technology, Auckland, New Zealand]. Retrieved 10 November 2023 from openrepository.aut.ac.nz/handle/10292/12338 [see PDF here]

Table D: Books		
Type	**Citation in book and on website**	**Reference on *Nation Dates* website**
Book – single author	(Author surname, initials., YYYY) Example: (Adams, P., 1977)	Author, A. (YYYY). *Title of work*. Location: Publisher, pp. xx–xx. [see PDF here] Example: Adams, P. (1977). *Fatal Necessity: British Intervention in New Zealand, 1830–1847*. Auckland: Auckland University Press, p. 107. [see PDF here Note: Where specific section(s)/page(s) are cited, include the page number(s) in the citation and reference list. Note: The full references for books should have their titles linked to where they can be found online (e.g. on Google Books). Note: For a book with multiple editions, include the edition number after the title. Example: Jackson, K. & McRobie, A. (2008). *Historical & Political Dictionary of New Zealand* (2nd ed.). Rangiora: MC Enterprises, p. 75. [see PDF here]
Book – two authors	(Author surname, initials & Author surname, initials., YYYY) Example: (Levine, S. & Vasil, R., 1985)	Author, A. & Author, B. (YYYY). *Title of work*. Location: Publisher, pp. xx–xx. [see PDF here] Example: Levine, S. & Vasil, R. (1985). *Māori Political Perspectives. He whakaaro Māori mo nga ti kanga kawanatanga*. Auckland: Hutchinson Publishing Group. [see PDF here]
Book – multiple authors	(Author surname, initials. et al., YYYY) Example: (Geiringer, C. et al., 2011)	Author, A., Author, B. & Author, C. (YYYY). *Title of work*. Location: Publisher, pp. xx–xx. [see PDF here] Example: Geiringer, C., Higbee, P. & McLeay, E. (2011). *What's the Hurry? Urgency in the New Zealand Legislative Process 1987–2010*. Wellington: Victoria University Press, p. 101. [see PDF here]
Book – no known author	(*Title of work*, YYYY) Example: (*Petone's First Hundred Years*, 1940)	*Title of work* (YYYY). Location: Publisher, pp. xx–xx. [see PDF here] Example: *Petone's First Hundred Years: A Historical Record of Petone's Progress from 1840 to 1940* (1940). Wellington: L. T. Watkins Ltd, p. 50. [see PDF here]
Edited book	(Editor surname, initials., YYYY: page numbers) Example: (McGill, D., 2004)	Editor, A. (ed.). (YYYY). *Title of work*. Location: Publisher. Example: McGill, D. (ed.) (2004). *The Reed book of New Zealand quotations*. Auckland: Reed. [see PDF here] Note: If there is more than one editor for the book, use '(eds)'. Citations for edited books with more than one editor follow the same rules as authored books (e.g. use an '&' for two editors and 'et al.' for multiple editors).

Chapter in an edited book	(Author surname, initials., YYYY) Example: (Richardson, D., 2002)	Author, A. (YYYY). Title of chapter. In A. Editor, B. Editor & C. Editor (eds), *Title of book* (pp. xxx–xxx). Location: Publisher. Example: Richardson, D. (2002). Values Party. In J. Barry & E. G. Frankland (eds), *International Encyclopedia of Environmental Politics* (pp. 461–463). New York: Routledge. [see PDF here]
Digitised book	(Author surname, initials., YYYY) Example: (Hocken, T. M., 1898)	For digitised books, include the retrieval date and the URL it was retrieved from in the full reference. Example: Hocken, T. M. (1898). *Contributions to the Early History of New Zealand (Settlement of Otago)*. London: Sampson Low, Marston and Company. Retrieved 25 July 2017 from nzetc.victoria.ac.nz/tm/scholarly/tei-HocCont-t1-back-d7-d43.html [see PDF here]

Table E: Personal communications and Official Information Act (OIA) requests		
Citation in book	**Citation in *Nation Dates* book only**	**Reference on *Nation Dates* website**
(Organisation/Surname, initials., pers. comm., DD Month YYYY). Example: (MOH, pers. comm., 20 April 2016) Example: (Orange, C., pers. comm., 15 October 2020; 16 November 2020)	Notes: If information used for an entry is contained in email correspondence, it should be referenced as a personal communication. This does not apply to documents that are attached to the email; these should be referenced normally. E.g. (Parliamentary Library, 2011) In the case of referencing OIAs, the date for the citation should be the date of response. Take care to ensure that no confidential information in a communication is included in the publication. Where citing more than one personal communication with the same organisation/person, give the organisation's/person's name once, followed by the dates of the communications. However, if the author of a personal communication is also referenced for a website, article, report or book, repeat the author's name. Example: (Orange, C., 2004: 74; Orange, C., pers. comm., 15 October 2020) Sometimes the Institute collates OIAs into one document, referred to as a 'schedule', if they relate to the same request. When referencing an OIA schedule, list the generic group the request was made to as the author and give the range of dates that responses were received. Example: (DHBs, pers. comm., 11 May 2022 to 8 September 2022)	For *Nation Dates*, personal communications are not added to the website reference tables. For the second edition of *COVID-19 Nation Dates*, personal communications are referenced in a table that lists all personal communications used throughout the book. The correspondence itself is still kept private, only the Institute's Official Information Act requests are linked in the table. For both *Nation Dates* and *COVID-19 Nation Dates*, details are kept in the personal communications folder, accompanied by a hard-copy record of each personal communication. The hard-copy file is ordered by date of communication (most recent at the front and oldest at the back).

Table F: Legal sources		
Type	**Citation in book and on website**	**Reference on *Nation Dates* website**
General rules for citing and referencing legal sources		APA does not account for New Zealand legislation. Accordingly, we have taken direction from, and adapted the text in this section from: New Zealand Law Foundation (2018). *New Zealand Law Style Guide Third Edition*. Retrieved 11 October 2021 from www.lawfoundation.org.nz/style-guide2019/index.html For any other legal sources, please consult the above guide. Generally, where a pinpoint citation (e.g. section, clause) is at the beginning of a sentence, write the full word, but the abbreviation can be used in the middle of a sentence. Example: Section 8 of the Resource Management Act refers to Treaty principles, and s 2 includes a definition of kaitiakitanga. Where a subsection or paragraph is referred to within its section, it should be cited as a section. E.g. Trustee Act 1956, s 67(2) or Banking Act 1982, s 2(a)(ii).
Legislation	(Act Title Year, s XX)	Legislation should not be referenced in the *Nation Dates* website, as the name of the Act/Statute/Legislation should be clear in-text. This is according to the *New Zealand Law Style Guide*. When referring to legislation in *Nation Dates*, always give the full title to avoid any confusion and the need for a citation. Legislation is written with the date at the end of the title unless integrated into the body text. The date used should always be when the legislation was granted royal assent (this can be found on the Act, under the title). Example: The plant spreads quickly and is later declared a weed by the Noxious Weeds Act 1900. Example: Eventually in 1993, with the passing of the Human Rights Act, discrimination on the grounds of sexual orientation is made illegal. Note: If placing the pinpoint reference (e.g. section) at the end of the citation, it should be preceded by a comma. If referring to legislation from another country, give the country's name in brackets. If the name has a common abbreviation, use that. Example: New Zealand Constitution Act 1846 (UK)
Secondary/delegated legislation	(Title Year, cl/r/reg XX)	Secondary legislation should also not be referenced in the *Nation Dates* website. Examples of secondary legislation include: External Reporting Board Standard A1 Application of the Accounting Standards Framework; FMA Standard Conditions for full financial advice provider licences. Again, as a general rule, always state secondary legislation in full to rule out the need for a

		citation.. Again, as a general rule, always state secondary legislation in full to rule out the need for a citation. Pinpoint references in secondary legislation will depend on what type they are. Orders use cl (clause), rules use r, and regulations use reg.
Bills	(Short Title Year of Introduction (Bill number-bar number), cl XX)	Bills are proposals to make a new piece of legislation or change an existing one. Each bill goes through several parliamentary stages before becoming legislation. Like legislation, bills should not be referenced in the *Nation Dates* website. The title of the bill should also be written clearly in text, avoiding the need for a citation. Note: bills use 'clauses' (cl), legislation uses 'sections' (s). Example: Judicial Matters Bill 2008 (216-1), cl 3.
Letters Patent	Letters Patent Title (Day Month Year), cl XX	Letters Patent should not be referenced in the *Nation Date*s website. Give the title of the Letter in full followed by the full date in brackets. A citation for Letters Patent is not needed as the full name should be clear in-text. Example: Letters Patent Correcting Original Description of the Limits of the Colony of New Zealand (dated 4 April 1842). Pinpoint reference to the clause does not need to be added unless necessary. Example: Letters Patent Constituting the Office of the Governor-General (witnessed 28 October 1983), cl 3. Note: The date used should ideally be the date that it was witnessed, e.g. (witnessed DD Month YYYY). If the date of witness is not available, use the date that it was signed, e.g. (signed DD Month YYYY). If neither of these dates are available, use the Letters Patent date given at the top of the page in the *Brookers Public Law Handbook* or some other reputable source, and use dated, e.g. (dated DD Month YYYY). See, for example, use of a reputable source on p. 62, 1842 Letters Patent Correcting Original Description of the Limits of the Colony of New Zealand. There is a great deal of confusion with Letters Patent and at least this way we are clear which date we are using.
Court cases	(*Party* v *Party* [year of judgment]) Example: (*Ortmann* v *The United States Of America* [2017])	*Party v Party* [year of judgment] Court abbreviation Case number (full date of judgment). [see PDF here] Example: a. Full reference in website table: *Ortmann v The United States Of America* [2017] NZHC 189 (20 February 2017). b. Citation in website table: (*Ortmann v The United States Of America* [2017])

		c. Citation in book: (*Ortmann* v *The United States Of America* [2017]) Notes: Cases are always cited as well as referenced in the *Nation Dates* website. Cases should also be cited with the case name in the text (e.g. *Ortmann v The United States Of America*). The neutral citation is a unique court-assigned reference for a judgment. It states the: 1. Parties; 2. year of judgment; 3. court; and 4. judgment number. For example: *Ortmann v The United States Of America* [2017] NZHC 189 Breakdown of citation: Parties: *Ortmann v The United States Of America* Year of Judgement: [2017] Court: NZHC Judgement number: 189 Information for the citation appears on the first page of the judgment: IN THE HIGH COURT OF NEW ZEALAND AUCKLAND REGISTRY CRI-2015-404-000429 [2017] NZHC 189 See Chapter 3: Cases in the *New Zealand Law Style Guide* from for further guidance.
United Nations Treaties	(Title, year of signing) Example: (UNICCPR, 1966)	Full title (full date of signing). Retrieved DD Month YYYY from URL [see PDF here] Example: United Nations International Covenant on Civil and Political Rights (UNICCPR) (16 December 1966). Retrieved 13 November 2023 from www.ohchr.org/en/instruments-mechanisms/instruments/international-covenant-civil-and-political-rights [see PDF here] Notes: Most United Nations treaties also have abbreviated titles. When this is the case, include the abbreviation after the title in the full reference. Use the abbreviated title in the citation. The date used should be when the treaty was signed. The United Nations Treaty Collection can be used to find the date of signing: treaties.un.org/Pages/ParticipationStatus.aspx?clang=_en

General Notes:

The Institute likes to use well recognised references and often looks to see whether information is broadly referenced so that we can have confidence in the accuracy of the text, e.g. referencing the Beehive.

Hard copies of all references are kept at the Institute. There are currently 28 folders for all 1833 references that support the 5th edition. These are also kept in four tables found on the *Nation Dates* website, here: nationdatesnz.org/fifth-edition. The second edition of *COVID-19 Nation Dates* currently has 17 folders for 1456 references. These references are kept in five tables found here: nationdatesnz.org/2ndedition

As a general rule the Institute is guided by the APA Style website (apastyle.apa.org/style-grammar-guidelines/citations/appropriate-citation) and AUT Library APA 7th Referencing Style Guide (aut.ac.nz.libguides.com/APA7th/Articles).

Authors:

1. Where the author of a reference is given, first initials are always included (including middle names if the author uses them). For authors with two initials, use spaces between initials (e.g. Baker, M. G.). There is no comma after an author's initial if followed by '&' or 'et al.'.

2. Sometimes an author's name appears differently in different works (e.g. Baker, M. G. or Baker, M.). We treat both versions of the name as the same author for abc purposes, so if multiple references have the same author but with different versions of their name, use only the first initial for all citations.

3. When there are two authors the names in the citation and full reference should be separated with '&' (rather than 'and'). Example:

   Citation:
   (Pool, I. & Kukutai, T., 2011)

   Full reference:
   Pool, I. & Kukutai, T. (5 May 2011). Taupori Māori - Māori population change. Te Ara - the Encyclopedia of New Zealand. Retrieved 4 November 2020 from teara.govt.nz/en/taupori-maori-maori-population-change [see PDF here]

   When there are three or more authors, the names in the full reference should be separated with commas but the last two names are separated with '&'. The citation only includes the first author's name followed by 'et al.' For example:

   Citation:
   (Becker, E. et al., 2021)

   Full reference:
   Becker, E., Vipond, R. & Mansell, C. (26 March 2021). Keeping up with COVID: identification of New Zealand's earliest known cluster of COVID-19 cases. *New Zealand Medical Journal*, 134(1532), 57-59. Retrieved 30 March 2021 from journal.nzma.org.nz/journal-articles/keeping-up-with-covid-identification-of-new-zealands-earliest-known-cluster-of-covid-19-cases-open-access [see PDF here]

When there are 21 or more authors, the full reference should list the first 19 authors followed by an ellipsis, then the last author. The citation only includes the first author's name followed by 'et al.' For example:

Citation:
(Ferguson, N. et al., 2020)

Full reference:
Ferguson, N., Laydon, D., Nedjati-Gilani, G., Imai, N., Ainslie, K., Baguelin, M., Bhatia, S., Boonyasiri, A., Cucunubá, Z., Cuomo-Dannenburg, G., Dighe, A., Dorigatti, I., Fu, H., Gaythorpe, K., Green, W., Hamlet, A., Hinsley, W., Okell, L., van Elsland, S., ... Ghani, A. (16 March 2020). Report 9: Impact of non-pharmaceutical interventions (NPIs) to reduce COVID-19 mortality and healthcare demand. Retrieved 11 July 2024 from www.imperial.ac.uk/media/imperial-college/medicine/mrc-gida/2020-03-16-COVID19-Report-9.pdf [see PDF here]

Citations:

4. In the book, citations of multiple sources by the same author/organisation should be separated by semi-colons. Citations with n.d. come after citations that have dates (e.g. MoJ, 2022; n.d.[a]).

5. Keep in mind that there are three main New Zealand Government websites distinct from one another: New Zealand Government, New Zealand Parliament and the Beehive. Be mindful you are citing the correct one (e.g. do not reference a Beehive web page as New Zealand Government).

6. Sometimes the administration of sources of information held by certain government departments or entities will be transferred to a different department or entity (e.g. during the COVID-19 pandemic, the Unite against COVID-19 public information campaign had its own website but this has since been deactivated and documents such as proactive releases have been moved to DPMC). In situations like these, the Institute has referenced the organisation or entity that currently holds the information or has re-published online. Note that this does not apply for organisations or entities that are still in operation (e.g. a Ministry for Culture and Heritage document found on the Beehive's website. Also, do not retrospectively change previous citations to account for this.

Website reference tables:

7. Full references entered into the website reference tables are given for every source type apart from image and quotation captions, personal communications, legislation (including secondary legislation), Bills and Letters Patent. Go to Tables A–F for more detail.

8. Reference tables must include both the URL where the reference was found and a scanned PDF of the hard-copy reference (linked to '[see PDF here]'). URLs change frequently and we have learned over time the value of having a hard copy and providing interested parties with a PDF as well as a link to the original source. The Institute recognises that not all readers of *Nation Dates* can come to our Wellington office. For this reason we make our sources public online. This is particularly important given the sensitivity of some of the topics discussed in *Nation Dates*. The Institute also wants to ensure we focus on delivering accurate and reliable information. This way our audiences can come back to us with more reliable sources to improve the accuracy or completeness of further editions.

9. All URLs in references on the *Nation Dates* website tables should have 'http://' or 'https://' removed as well as any '/' or '.' at the end of the URL. For example: www.beehive.govt.nz/release/planning-future-no-new-offshore-oil-and-gas-exploration-permits

10. Where updated dates of references are provided (e.g. updated 30 May 2023), use these over the original date of publishing.

11. If confused about how to order references alphabetically in the website tables (particularly with '&' and 'et al.'), use Excel's alphabetical order function. (The Sort & Filter button is on the far right in the home tab.)

12. If a reference is a PDF (e.g. a report or publication that is primarily found online), the URL provided in the website tables should be for the web page where the PDF can be found, not the PDF itself. This is to avoid broken links if the PDF is changed or updated. The exception is if a source can only be found as a PDF and is not on a web page. For example:

    Ministry of Education (MoE) (22 June 2021). *Determining the NCEA Level 1, 2, and 3 Subject Lists for Te Marautanga o Aotearoa*. Retrieved 13 August 2023 from ncea-live-3-storagestack-53q-assetstorages3bucket-2o21xte0r81u.s3.amazonaws.com/s3fs-public/2021-06/Technical%20Report%20TMoA.pdf?VersionId=DV_LCpf0dqR2BeROrkVHghISsckS_Nuo[see PDF here]

    If a source is not available online but we have a copy in the office, it is fine to upload only a scanned PDF linked to [see PDF here]. See (*New Zealand Gazette*, 1907) in the *Nation Dates 5th edition* website tables for an example.

13. Italicise the newspaper/organisation title only for printed hard-copy publications (e.g. *New Zealand Herald* and the *Guardian*). Do not italicise news agencies that do not produce a hard copy (e.g. Stuff, Newshub, Radio New Zealand).

14. As mentioned above, personal communications and legal sources are not added to the main reference tables for the following reasons:
    - Personal communications: The Institute always treats personal communications as private, unless we have approval from the sender to make the correspondence public. Go to Table E for more detail.
    - Legal sources: The Institute always refers to the full legal name of legislation in text, so there is no need to reference the legislation in a reference table. Go to Table F for more detail on legislation and other legal sources (e.g. Bills and Letters Patent).

    The second edition of *COVID-19 Nation Dates* does however have a personal communications table that lists all personal communications used throughout the book. The correspondence is still kept private, only the Institute's Official Information Act requests are linked in the table.

The more problematic areas are discussed in detail, with examples, in Tables 1–9 below.

Table 1: Using correct names of organisations (te reo Māori or English)	
Citation in book and on website	**Reference on *Nation Dates* website**
APA practice is to include both the English and Māori names in the order provided in the source. We have adapted this for the *Nation Dates* referencing style. Key things to consider: 1. The explanation on the inside cover of how the publication should be cited. Follow this as the primary guideline. If the publication does not have one, consider the next two points. 2. Think about when the document was published. For example: - A report published in 1960 by a government department will most likely not use a Māori name (e.g. the Department of Justice). - A report published in 2020 by a government department is more likely to have, and use, a Māori name (e.g. Te Puni Kōkiri and Oranga Tamariki). 3. If it is still not clear how to reference a government department, use the name of the entity provided in the Public Service Act 2020 Schedule 2. Note: Do not update organisation names that have since changed (e.g. if a document is published by the Department of Labour, do not cite it as the Ministry of Business, Innovation and Employment). Note: References that do not have a date (usually web pages) should use the organisation's most current name. Note: If the organisation's name is in both Māori and English, give both names separated by an en dash in the order provided in the source. Example of acceptable citations using both Māori and English names for the same organisation: (Waka Kotahi – NZTA, 2017)	Examples of full references in website tables: Te Puni Kōkiri (TPK) (2007). About us. Retrieved 18 December 2009 from www.tpk.govt.nz/en/about [see PDF here] Waka Kotahi – New Zealand Transport Agency (NZTA) (n.d.). Auckland Harbour Bridge fact sheet. Retrieved 1 November 2020 from www.nzta.govt.nz/assets/site-resources/content/about/docs/auckland-harbour-bridge-factsheet.pdf [see PDF here]

Table 2: Images and quotations	
Citation in book and on website	**Reference on *Nation Dates* website**
The protocol for citations used for image captions and quotations is the same as stated in Tables A–F. The only exception is that citations should use the full names of organisations and other entities. Example of citations used for images and quotations: (Ministry of Health, 2022)	For *Nation Dates*, references used for image captions (when added context needs to be evidenced) and quotations have been added into the four reference tables. Note that this may be likely to change in future editions so that these references have a specific table. For *COVID-19 Nation Dates*, references used for image captions and quotations are held in a unique table (note this table is different to the image credits table which lists information such as the image creator and the date that the image was taken). The protocol for references in this table is the same as stated in Tables A–F, but with two exceptions. These are as follows: • References should ideally use the full names of organisations and other entities, although this is not strictly required. • The references in this table have their own abc lettering system (i.e. do not use references from the same author in the main tables to decide what letter is assigned). Example of full reference used for images and quotations: Ministry of Health (May 2022). Super Saturday and Vaxathon: Proactive Release of information. Retrieved 29 August 2024 from www.health.govt.nz/system/files/2022-05/super-saturday-proactive-release-information-5mar22.pdf [see PDF here]

Table 3: Abbreviations and acronyms	
Citation in book and on website	**Reference on *Nation Dates* website**
All abbreviations used in the book need to be listed in the abbreviations pages at the back. The use of an abbreviation in a citation depends on the following points. Key characteristics to consider: - If it relates to only one event/entry an abbreviation is not needed. - If the organisation's full name will use up too much space on a page, abbreviate it. - How well-known is the abbreviation? Use commonly known abbreviations such as RNZ (Radio New Zealand) and NZDF (New Zealand Defence Force), but do not use lesser-known abbreviations such as AMN (Australian Migration Network). - Are there double-up abbreviations? E.g. do not use ANZ for Antarctica New Zealand because of the banking corporation ANZ. - If the organisation's full name and abbreviation have been given in the text for the entry, use the abbreviation in the citation (see *Nation Dates* 5th edition, p. 272 for an example). Notes 1. If abbreviations relate to government organisations from other countries and could potentially be confused with NZ organisations, give the country in square brackets following the abbreviation (see also general notes for how this applies to names in full). Example: (DFAT [AU], 2018) Where a country does not have a widely recognised abbreviation, give its full name in square brackets after the name of the organisation. Example: (Ministry of Health [Singapore], 2020) 2. Royal commissions are always written out in full and should not be abbreviated. 3. Citations of United Nations organisations are always abbreviated. Examples: (UNDP, n.d.) (UNESCO, n.d.[a])	Where the citation in the book has used the abbreviation, give the full name in the reference, followed by the abbreviation in brackets. Example: a. Citation in book: (IPCA, 2013) b. Full reference in the website table: Independent Police Conduct Authority (IPCA) (2013). *Operation Eight: The Report of the Independent Police Conduct Authority*, p. 41. Retrieved 8 February 2017 from www.ipca.govt.nz/Site/publications-and-media/2013-Reports-on-Investigations/default.aspx [see PDF here] Note: Do not provide an abbreviation in the full reference if the organisation is the publisher. Example (organisation as publisher): Palmer, R. (2021, 4 October). Three waters: What you need to know. Radio New Zealand. Retrieved 22 May 2023 from www.rnz.co.nz/news/what-you-need-to-know/452865/three-waters-what-you-need-to-know [see PDF here] Example (organisation as author): Radio New Zealand (RNZ) (2009a, 8 March). Bioethics Council to be disbanded. Retrieved 30 October 2017 from www.rnz.co.nz/news/national/12639/bioethics-council-to-be-disbanded [see PDF here]

Table 4: Examples of commonly used abbreviations in citations

Abbreviated citation	Full name in full reference
DPMC	Department of the Prime Minister and Cabinet (DPMC)
Health NZ	Health New Zealand (Health NZ)
MOH	Ministry of Health (MOH)
NZ Herald	*New Zealand Herald* (*NZ Herald*)
RNZ	Radio New Zealand (RNZ)
Treasury	New Zealand Treasury (Treasury)

Table 5: Page numbers	
Citation in book and on website	**Reference on *Nation Dates* website**
No page numbers should be included in citations in the book or on the website. They should only be found in the full reference.	Page numbers are included in the reference where necessary. - If the source is longer than three pages, add page numbers to clarify where the information came from. - If one source is used for multiple entries, include the pages used for each entry in the reference. Example of full reference in the website table: McKinnon, M. (2003). *Treasury: The New Zealand Treasury 1840–2000*. Auckland: Auckland University Press, pp. 219–220, 247, 308. [see PDF here] - If the page(s) used does not have a number, use the description of where it is in the book (such as preface or introduction). For example: McKinnon, M. (2003). *Treasury: The New Zealand Treasury 1840–2000*. Auckland: Auckland University Press, Preface. [see PDF here]

<table>
<tr><th colspan="2">Table 6: Citations in the supplementary chapters of Nation Dates</th></tr>
<tr><th>What the citation is used for</th><th>Comments</th></tr>
<tr><td>Figures and tables</td><td>Citations for references used in figures and tables sit directly below the title of the figure or table and should not be enclosed in brackets.

If a figure or table is an exact excerpt or copy of a source (e.g. screenshot of a diagram), state ‘Source:’ before the citation(s). For example:
Figure A2.1: Aotearoa New Zealand’s 2020 elimination strategy, 2020
Source: MOH, n.d.[d]

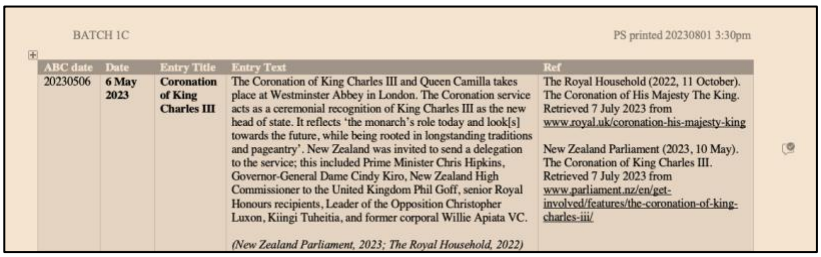
If a figure or table has been created by the Institute using information from one or more sources, state ‘Adapted from:’ before the citation(s). For example:
Table 3.1: Published composition of the national reserve supply, 2017–2021
Adapted from MOH, 2017a; 2020a; 2020b; 2021a; MOH, pers. comm., 26 April 2024

Note: Sometimes, the citations might be found within the notes to the figure or table. In these cases, the text below the title should direct to these notes. For example:
Table 1.1: Arrival of SARS-CoV-2 variants in New Zealand
Source: See notes 1 and 2 below.
Notes to Table 1.1
1. The date that the detection was announced (as opposed to the date the sample that tested positive was collected). See entries by date in Chapter 6.
2. The date that the positive sample was collected (as opposed to the date it was announced). (Adapted from ESR, pers. comm., 14 March 2024)</td></tr>
<tr><td>Paraphrased text</td><td>When citing references in the supplementary chapters of Nation Dates, include the citation in-text at the end of each paragraph/subsection that it relates to.

Example:
Therefore, the public health settings already in place in 2023 are considered appropriate for managing the more recent subvariants (MOH, 2023a).</td></tr>
<tr><td>Quoted text</td><td>When citing a quote or an excerpt of text, add the in-text citation directly after or next to the quoted text.

Example:
MOH reported that ‘Delta posed very different challenges to earlier strains of COVID-19, with its rapid transmission, infectiousness and higher risk of needing hospital care. People who were not vaccinated were most at risk of severe illness’ (MOH, 2023a). This shifted the focus to vaccinating a large percentage of New Zealanders as quickly as possible, what became known as The 90% Project.</td></tr>
</table>

Table 7: NZ History and Te Ara references	
Citation in book and on website	**Reference on *Nation Dates* website**
See Table A: Websites and web pages, for how to format these citations.	NZ History and Te Ara provide suggested citations, but these should be adapted to our referencing style. 1. Full references for these sources should include the main title and page title (e.g. Korean War – End of the conflict). 2. Reference NZ History web pages as MCH. Examples: a. NZ History suggested citation: 'Background', URL: https://nzhistory.govt.nz/war/korean-war/background (Ministry for Culture and Heritage), updated 19-Oct-2022 b. Our reference: Ministry for Culture and Heritage (MCH) (2020xx). Background – New Zealand in the Korean War. Retrieved 31 June 2020 from nzhistory.govt.nz/war/korean-war/background [see PDF here] 3. Te Ara – the Encyclopedia of New Zealand web pages are also published by MCH but often provide authors. These should be referenced to the author and Te Ara. Examples: a. Te Ara suggested citation: Neill Atkinson, 'Railways - Building the rail network', Te Ara - the Encyclopedia of New Zealand, www.TeAra.govt.nz/en/railways/page-1 (accessed 2 November 2023) b. Our reference: Atkinson, N. (2010a). Railways – Building the rail network. Te Ara – the Encyclopedia of New Zealand. Retrieved 26 July 2011 from www.teara.govt.nz/en/railways/page-1 [see PDF here]

Table 8: How to reference hard and soft copies	
Task/action	**Comments**
Abc lettering system	Where the same author (e.g. MCH) has produced multiple sources in one year, the citations (as well as full references) follow an abc system and are assigned a letter in addition to the year (e.g. MCH, 2010a). If they get to z, the lettering system becomes aabbcc (and subsequently aaabbbccc). These can only be finally assigned when the text order is confirmed; in the interim, record them as the author and year of publication followed by * (e.g. MCH, 2010*).
Labelling PDFs	All hard-copy references need to have DYMO labels with the same citation of the reference that can be found on the *Nation Dates* website reference tables. Any supporting references should only have labels that state they are a supporting reference and not a citation to avoid confusion with the main reference that they relate to. See the hard-copy reference folders for an example.
Scanning PDFs	Each reference must have a printed hard copy that can be found in the hard-copy reference folders. These hard copies should always have the information that was used for the entry highlighted in yellow (other colours are often unreadable). If the information was paraphrased add a P next to the highlighted text and if quoted use a Q. Sometimes supporting references are needed to back up the information that was used in an entry. These are not scanned and uploaded but should be attached to the main reference that they support and included in the hard-copy reference folders.
Batching references (Word docs and PDFs)	References for both new entries and updated entries should always be treated in batches. Batches are numbered 1 if they relate to new entries and 2 if they relate to updated entries. An ABC lettering system is used for each individual batch (e.g. Batch 1A or Batch 2C). A Word doc with an entry table is used to show the dates of entries, their titles, their text (including the citations), and the references used. See an example of the formatting in this Word doc below. (Note that for updates of existing entries, a different format is used, see the McGuinness Institute *Selecting and writing protocol*).  BATCH 1C PS printed 20230801 3:30pm ABC date: 20230506 | Date: 6 May 2023 | Entry Title: Coronation of King Charles III | Entry Text: The Coronation of King Charles III and Queen Camilla takes place at Westminster Abbey in London. The Coronation service acts as a ceremonial recognition of King Charles III as the new head of state. It reflects 'the monarch's role today and look[s] towards the future, while being rooted in longstanding traditions and pageantry'. New Zealand was invited to send a delegation to the service; this included Prime Minister Chris Hipkins, Governor-General Dame Cindy Kiro, New Zealand High Commissioner to the United Kingdom Phil Goff, senior Royal Honours recipients, Leader of the Opposition Christopher Luxon, Kiingi Tuheitia, and former corporal Willie Apiata VC. *(New Zealand Parliament, 2023; The Royal Household, 2022)* Ref: The Royal Household (2022, 11 October). The Coronation of His Majesty The King. Retrieved 7 July 2023 from www.royal.uk/coronation-his-majesty-king New Zealand Parliament (2023, 10 May). The Coronation of King Charles III. Retrieved 7 July 2023 from www.parliament.nz/en/get-involved/features/the-coronation-of-king-charles-iii/ When sending batches of references to be uploaded to the *Nation Dates* website tables, they should always be sent in folders with the entry table Word doc and the PDFs of the references used. Before uploading references to the website tables, all references in the entry table Word doc must be isolated and added into another Word doc that has a reference table. This will have the key information relating to each reference. E.g.:

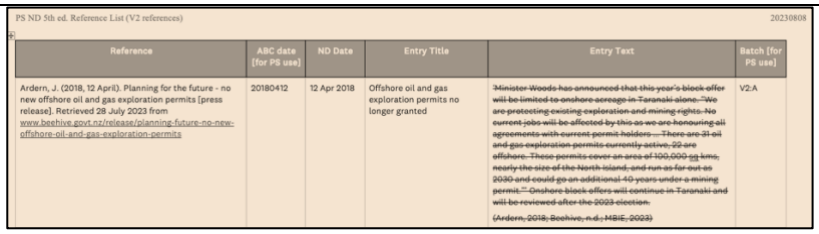
	 PS ND 5th ed. Reference List (V2 references) 20230808 Reference | ABC date (for PS use) | ND Date | Entry Title | Entry Text | Batch (for PS use) Ardern, J. (2018, 12 April). Planning for the future - no new offshore oil and gas exploration permits [press release]. Retrieved 28 July 2023 from www.beehive.govt.nz/release/planning-future-no-new-offshore-oil-and-gas-exploration-permits | 20180412 | 12 Apr 2018 | Offshore oil and gas exploration permits no longer granted | ~~"Minister Woods has announced that this year's block offer will be limited to onshore acreage in Taranaki alone. "We are protecting existing exploration and mining rights. No current jobs will be affected by this as we are honouring all agreements with current permit holders ... There are 31 oil and gas exploration permits currently active, 22 are offshore. These permits cover an area of 100,000 sq kms, nearly the size of the North Island, and run as far out as 2030 and could go an additional 40 years under a mining permit." Onshore block offers will continue in Taranaki and will be reviewed after the 2023 election.~~ (Ardern, 2018; Beehive, n.d.; MBIE, 2023) | V2:A Always follow this flowchart before uploading references for new and updated entries to the website. Entry table (Word doc) → Reference table (Word doc) → References get uploaded to website
Organising references before adding to the hard-copy reference folders	Before going into the hard-copy reference folders, references for new entries and updated entries should be organised as packages in plastic clear files: - For each new entry make up a clear file with DYMO labels stating the title of the entry or the name of the chapter. - The references for each entry should be in their own clear files added to this (reference clear files are labelled with the title and date of the entry they relate to, the citation of the reference, and 'new entry'). - These are treated as a package and added to one more clear file that holds all of them together. Note that for updated entries the process is the same but 'new entry' is replaced with 'updated entry'.
Check of the PDFs and weblinks on the *Nation Dates* website tables	Once the PDFs and website links have been uploaded to the table, a final check should be done to ensure they have been uploaded correctly. It is important to note that <u>before</u> the PDFs are uploaded to each reference, they should be checked according to the checklist below. <u>Instructions for a PDF:</u> • No blank pages • Correct a, b, c on citation (e.g. McSaveney, E. et al., 2009b). • No entry date in citation (the DYMO label should only be the author, their initials, year of publication, a, b, c, and page numbers used in the source). • Highlighted text that was used for entries (with p's and q's for paraphrasing and quotes). <u>Checklist for PDFs and web links:</u> 1. Check PDF is attached to the correct reference. 2. Check PDF is correctly formatted (refer to instructions above). 3. If PDF is incorrect, it is corrected, rescanned and marked in the hard-copy reference folder with a coloured piece of paper. This is used as a placeholder until the hard-copy reference can go back into the folder. 4. Add author's intials if they are missing from citation and reference, write in initial/s, and mark up with a post-it note. Someone else in the team will go through the post-it notes and reprint DYMOs, rescan and upload. 5. Check all pages of a reference used in book entries are cited in the full reference, the citation, and the book. 6. Check website link is correct (for the right reference) and in the correct place within the full reference (e.g. after retrieval date or on book title).

Table 9: Use of italics/roman for (i) print publications and (ii) court cases

Comments

As a general style rule of *Nation Dates*, citations for entries are italicised. Due to this, print publications and court cases (references that are normally italicised) are roman in these groups of citations.

Citations for other content, such as quotations, images and general chapter text, are roman, so print publications and court cases are italicised in these references.

Examples of the style of citations in the book for print publications and court cases are as follows:

- Citation of a print publication is used for a quotation; it/they are italicised.
  Example (*Nation Dates* 5th edition, p. 280):

> Quotation: Speaker Trevor Mallard in response to turning the lawn sprinklers on, drenching protesters and their tents. See 11 February 2022 in Covid 19 Omicron outbreak Parliament protest: Sprinklers turned on, 'second wave convoy' en route (*NZ Herald*, 2022a)

- Citation of a print publication is used in a citation row for an entry; it/they are in roman.
  Example (*Nation Dates* 5th edition, p. 294):

2023
16 May

Loafers Lodge disaster

In the early hours of Tuesday 16 May, a fire breaks out at a hostel in Wellington's Newtown. Many of the 99 hostel residents are vulnerable members of the community. Tenants are evacuated, some from the roof, but there are five fatalities. Residents report confusion around fire alarms, raising concerns around safety measures in emergency and transitional housing. Police charge a man with two counts of arson and five counts of murder in relation to the fire. [t65]

(Hickman, B., 2023; Knell, C. & Hunt, T., 2023; NZ Herald, 2023e; RNZ, 2023h; 2023i; Stuff, 2023)

- Citation of a court case is used for a general chapter text; it/they are italicised.
  Example (no current example in *Nation Dates* 5th edition):

(Ortmann v The United States Of America [2017; 2018]; 2021a; 2021b)

- Citation of a court case is used in a citation row for an entry; it/they are in roman.
  Example (*Nation Dates* 5th edition, p. 287):

2022
8 Nov

Legal decision: *Tuna v Te Urewera Board*

Te Uru Taumatua, the Tūhoe settlement entity, has been pulling down and replacing dozens of huts in Te Urewera that it deemed no longer fit for use and already falling down. This upset hapū, trampers, hunters and conservationists, and a Tūhoe member concerned about the loss of access to the huts appealed to the High Court. The High Court orders an immediate halt to the destruction of 48 huts. [t66]

(Harawira, W., 2022; RNZ, 2022m; Tuna v Te Urewera Board [2022])

<u>Print publications in *Nation Dates* 5th edition</u>

Note: Do not use 'The' before the titles of newspapers or magazines. The only exception is *The Times* (London).

International:

- *Guardian*
- *New York Times*

New Zealand:

- *New Zealand Herald (NZ Herald)*
- *Otago Witness*
- *Post*
- *Press*

Changes to processes going forward

The list below outlines changes to parts of the process of updating *COVID-19 Nation Dates* to the 2nd edition that were creating inefficiencies or ongoing issues. See *Selecting and writing protocol* for changes to book content processes.

This list is a living list and will be updated over time with any further changes to be made to the processes of future *Nation Dates* editions:

- Remove lettering from the labels on the PDFs that are uploaded to the website reference tables (e.g. labels in future should read (Ardern, J., 2020) not (Ardern, J., 2020a)).
    - Also, remove lettering from the full references in the website reference tables. This means that on the website reference tables, only the citations include lettering.
- Remove entry dates from the labels on PDFs that are uploaded to the website reference tables.
- Only cite the first initial of authors' names to avoid confusion with abcs and to increase efficiency and tidiness of referencing.