



CIVICPLUS

Content Development

Content Best Practices

CIVICPLUS CONTENT DEVELOPMENT

Best Practices Guide

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Introduction

Purpose

The CivicPlus Internal Best Practices Guide is a checklist for implementing accessibility principles within the CivicEngage content management system (CMS) to achieve Web Content Accessibility Guidelines (WCAG) conformance and optimize content usability. Content Editors apply the guide to client content during Content Migration and Optimization. Application of the guide is reviewed during Quality Control and the Content Editor is given a Quality Score based on the outlined scoring criteria.

Compliance

Americans with Disabilities Act (ADA)

The [Americans with Disabilities Act \(ADA\)](#) is a civil rights legislation that was created to ensure people with disabilities have equal access to commercial, state and local government facilities; it does not define technical standards for web accessibility. Website based ADA lawsuits, complaints, and Department of Justice settlements reference WCAG 2.0 Level A and AA compliance.

Section 508

[Section 508](#) requires electronic and information technology of Federal agencies is accessible to people with disabilities. To be compliant with Section 508 electronic content must conform to WCAG 2.0 Level A and AA.

Web Content Accessibility Guidelines (WCAG)

The [Web Content Accessibility Guidelines \(WCAG\)](#) were developed to make content accessible to people with disabilities and users in general. WCAG accounts for accessibility on various devices and considers many different disabilities. Three levels of conformance are used in WCAG:

- A – ensures users can access web content
- AA – ensures users can easily access web content
- AAA – ensures easy access to web content for specific users (not applicable to all content)

WCAG is based on four principles of web accessibility: accessible content must be perceivable, operable, understandable, and robust.

Sources

This guide was created using the [Web Content Accessibility Guidelines \(WCAG\) 2.1](#). Supplementary information interpreting WCAG was derived from [WebAIM](#).

Accessibility

Content can be compliant and technically accessible, but functionally inaccessible. Content Editors are advised to use this guide and their best judgement to ensure content is compliant and accessible. For situations that cannot be addressed by this guide use the sources provided, the recommendations of the Web Content Specialists, Content Quality Analysts, or the Content SME to ensure content is accessible. Any deviations from the guide should be properly documented.

Compliance

Images

<p>Alt Text</p> <ul style="list-style-type: none"> • All images have succinct, accurate, and equivalent alt text • Alt text presents content and function of image • Alt text is not redundant or use phrases such as “image of” or “graphic of” 	<p>WCAG 1.1.1 Non-text Content (Level A)</p>
<p>Animations</p> <ul style="list-style-type: none"> • Do not place animated images on the page • Add animated images to the image repository • Note to the client the image was not placed on the page 	<p>WCAG 2.2.2 Pause, Stop, Hide (Level A)</p>
<p>Complex Images (chart, graph, map, text)</p> <ul style="list-style-type: none"> • Alt text describes information in image, or • Text displayed in image is used as alt text (100-character limit), or • Link is provided to an accessible format of the information (alt text should describe general content of image and function of link), or • Note to the client to provide accessible version of image 	<p>WCAG 1.4.5 Images of Text (Level AA)</p>
<p>Decorative Images (stock photos, clip art)</p> <ul style="list-style-type: none"> • Decorative images are not placed on the page • Decorative images are uploaded to the image manager • Note to the client the images were not placed on the page 	<p>WCAG 1.1.1 Non-text Content (Level A)</p>
<p>Linked images</p> <ul style="list-style-type: none"> • Alt text describes the function as well as the content • Images linked to documents include document extension in alt text 	<p>WCAG 1.1.1 Non-text Content (Level A)</p>
<p>Slideshow</p> <ul style="list-style-type: none"> • Limit of 4 images in slideshow (larger amounts of photos should go in Photo Gallery and should be linked on page) • Turn on Next/Previous Arrows and Pagination options • Complex images (charts, graphs, maps, images with text) are not used in slideshows 	<p>WCAG 2.2.2 Pause, Stop, Hide (Level AA)</p>

Text

<p>Abbreviations & Acronyms</p> <ul style="list-style-type: none"> • Write out on first reference followed by acronym in parentheses (example: “Accounting and Auditing Policy (AAP)”) • Label abbreviation with HTML <abbr> • If unable to write out, leave a client note 	<p>WCAG 3.1.4 Abbreviations (Level AAA)</p>
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<p>Font</p> <ul style="list-style-type: none"> • Underline text is used only for hyperlinks • All caps can be used for acronyms, not for emphasis (use bold) • Do not use italics (use bold for emphasis) • Do not bold entire sentences or blocks of text • Do not fully justify text (align to both left and right margin) 	<p>WCAG 1.4.8 Visual Presentation (Level AAA)</p>
<p>Language</p> <ul style="list-style-type: none"> • Label text other than English in editor widget using the HTML attribute <code></code> 	<p>WCAG 3.1.1 Language of Page (Level A)</p>
<p>Link text</p> <ul style="list-style-type: none"> • The purpose of each link can be determined from the link text alone, or from the link text and its context (e.g., surrounding text, list item, table cell, or table headers). • Links (including emails) are masked 	<p>WCAG 2.4.4 Link Purpose (Level A)</p>
<p>Quotes</p> <ul style="list-style-type: none"> • Label quotes using HTML attribute <code><blockquote></code> 	<p>WCAG 1.3.1 Information & Relationships (Level A)</p>
<p>Sensory Characteristics</p> <ul style="list-style-type: none"> • Instructions do not rely upon shape, size, or visual location (example: "Click the square icon to continue" or "Instructions are in the right-hand column") 	<p>WCAG 1.3.3 Sensory Characteristics (Level A)</p>
<p>Tables</p> <p>Information type</p> <ul style="list-style-type: none"> • Use tables to organize sets of repetitive and related information • Do not use tables for formatting • Header titles accurately describe information in related cells <p>Do not use images, colors, or standalone symbols in cells to relay information</p> <p>Display</p> <ul style="list-style-type: none"> • All columns have intuitively named headings • Header rows and/or columns are properly distinguished from other rows • Tables have alternate rows color setting • Cells are not left blank <p>Formatting</p> <ul style="list-style-type: none"> • Information is listed in logical order (example: alphabetized, numerical, rank, etc.) • Dollar amounts or number decimals are all formatted the same way to make information scannable 	<p>WCAG 1.3.1 Information & Relationships (Level A)</p> <p>W3C Tables Concepts</p>

In-House Formatting Consistency

Images

<p>Formatting</p> <ul style="list-style-type: none"> • Wrap text around images to remove excess white space • Image placement does not impede scannability of page content • Remove background styles for images placed on the page using the image widget 	
<p>Logos</p> <ul style="list-style-type: none"> • Add all logos to the Image Repository and place on the page • Alt text includes image text, but does not include the word “logo” 	<p>WebAIM Alternative Text - Logos</p>
<p>Mobile Responsive</p> <ul style="list-style-type: none"> • Images in the editor widget have width attributes set as a percentage 	<p>CivicPlus Help Center Create Mobile-Responsive Images</p>

Pages

<p>Linked Pages</p> <ul style="list-style-type: none"> • Linked pages link directly to source page, not to a linked page • Page titles reflect intended use of page (example: How Do I or I Want To Global subpage titles) • Linked pages do not have subpages • Linked pages that link to files have the file extension in parentheses in page title 	<p>CivicPlus Help Center: Global Navigations</p> <p>CivicPlus Help Center: Linking Documents</p>
<p>Page Description</p> <ul style="list-style-type: none"> • All pages must have a complete sentence page description that describes the content on the page and includes proper punctuation • Page descriptions displayed on pages (Pages Widget) should have variations in verbiage 	
<p>Page Titles</p> <ul style="list-style-type: none"> • Page titles are descriptive, informative, and describe main topic found on page • Page title and menu title are the same • Use a space on either side of / (slash) to prevent breaking in left-hand navigation and mega menus (example: “Parks / Recreation Department”) 	<p>WCAG 2.4.2 Page Titled</p> <p>(Level A)</p>

Text

<p>Boards & Commissions</p> <p>Template</p> <ul style="list-style-type: none"> • Format according to Boards and Commissions Template and be consistent as possible between boards • Leave client note to provide information if page does not have all template information • List members in bulleted list by rank/ward/district first and then alphabetize any remaining members by last name, a table can be used for extensive information • Biographical information should be housed on hidden subpages <p>Boards and Commissions Main Governing Bodies</p> <ul style="list-style-type: none"> • Main board examples include Board of Commissioners, City Council • Enter contact information into Staff Directory <p>Boards and Commissions Non-Governing Bodies</p> <ul style="list-style-type: none"> • Non-governing bodies examples include Planning Board, Library Board • Place contact information in bulleted list using contact information block • Do not add contact information to Staff Directory 	<p>CivicPlus Help Center Resources:</p> <p>Main Governing Board Template (without photos)</p> <p>Main Governing Board Template (with Photos)</p> <p>Main Governing Board Member Template</p> <p>Non-Governing Board Template</p>
<p>Bulleted Lists</p> <ul style="list-style-type: none"> • Bullet lists of 5 or more items, or complicated lists including lists within lists • Lists are introduced by page title, subhead, sentence, or sentence fragment with colon • Do not use end punctuation for sentence fragments • Alphabetize lists of nouns • Sentences and fragments do not need to be alphabetized • Alphabetize lists of names by last name or rank 	<p>WebAIM Making Web Content Accessible to People with Cognitive Disabilities</p>
<p>Contact Information</p> <p>Address</p> <ul style="list-style-type: none"> • Spell out all street modifiers (street, avenue, etc.) • Abbreviate all compass points without periods (N, S, NE, NW, etc.) • Secondary address information on second line (apartment, P.O. box, room name, suite, unit, etc.) <p>Phone / Fax Numbers</p> <ul style="list-style-type: none"> • xxx-xxx-xxxx, ext. xxx (always include area code) • xxx (for 3-digit numbers such as 911 or 411) • Phone and fax numbers must be labeled • Phone numbers in text (not address blocks) should be introduced with a sentence <p>Time</p> <ul style="list-style-type: none"> • Use noon and midnight in place of 12 a.m. and 12 p.m. • Use periods in a.m. and p.m. 	

<p>Contact Information Address Block</p> <ul style="list-style-type: none"> • Use address block when full address is listed within page content • Do not add an extra line break above an address block • Leave a line break between the bottom of the address block and any following content • Address blocks should not be bulleted or indented unless they are part of a bulleted list • Example Address Block Patti Plus Title Department Street Address Suite / Floor / Room / Secondary Information City, ST Zip Phone: xxx-xxx-xxxx, ext. xxx Fax: xxx-xxx-xxxx Email Patti Plus <p>Hours [bold] Monday through Friday 8 a.m. to 5 p.m.</p>	
<p>Dates</p> <ul style="list-style-type: none"> • Do not abbreviate months (example: correct “December” incorrect “Dec”) • Use Month Day, Year format for dates in paragraph text (example: “December 31, 2020”) 	
<p>Documents</p> <ul style="list-style-type: none"> • Upload documents in file format found on client site; do not convert documents to PDFs • For document naming conventions, see respective module 	
<p>Links</p> <ul style="list-style-type: none"> • Broken links are not brought over to the production site; note to the client if broken links are found • Add links to other departments, offices, modules, or resources mentioned in client content when they are required for next steps; if not able to locate link, leave a client note <p>Documents</p> <ul style="list-style-type: none"> • Links to internal or external documents open in new window • Links to documents have a file extension (example: “Water Report (PDF)”) <p>Email</p> <ul style="list-style-type: none"> • Mask email address and include the work email and the person/department name in link text (example: “email Patti Plus”) • Use mailto: for email links (example: Email Water 	<p>WebAIM Links and Hypertext</p> <p>CivicPlus Help Center: Linking Documents</p>

<p>Department</p> <p>Websites</p> <ul style="list-style-type: none"> • Links to internal or external websites open in same window 																																											
<p>Numbers</p> <ul style="list-style-type: none"> • Use a comma after every 3rd digit (example: 123,456) • Include zero before decimals (example: 0.13) • Fractions should be written out as numerals separated by a forward slash (example: 1/3) • Remove instances of written out numbers with numerals (example: correct “7” incorrect “seven (7)”) 																																											
<p>Symbols</p> <p>Ampersands &</p> <ul style="list-style-type: none"> • Use the ampersand (&) in category titles, page titles, subheads, and table header rows • Write out “and” in all paragraph text unless it is an official company name (example: AT&T) <p>Asterisk *</p> <ul style="list-style-type: none"> • If an asterisk is being used to indicate a footnote, reformat the information so the asterisk is not the only way the footnote is communicated, or leave a client note <p>At @</p> <ul style="list-style-type: none"> • The @ symbol is read out by screen readers but should be written out in text for consistency <p>Symbols that can be used in text are listed in the following table. All other symbols must be written out.</p> <table border="1" data-bbox="237 1150 1097 1640"> <thead> <tr> <th>Symbol</th> <th>Description</th> <th>HTML</th> </tr> </thead> <tbody> <tr> <td>&</td> <td>and</td> <td>&amp;</td> </tr> <tr> <td>£</td> <td>British pound</td> <td>&pound;</td> </tr> <tr> <td>•</td> <td>bullet</td> <td>&#8226;</td> </tr> <tr> <td>©</td> <td>copyright</td> <td>&copy;</td> </tr> <tr> <td>°</td> <td>degree</td> <td>&deg;</td> </tr> <tr> <td>\$</td> <td>dollar</td> <td>\$</td> </tr> <tr> <td>€</td> <td>euro</td> <td>&#8364;</td> </tr> <tr> <td>¶</td> <td>paragraph</td> <td>&para;</td> </tr> <tr> <td>%</td> <td>percent</td> <td>%</td> </tr> <tr> <td>®</td> <td>registered</td> <td>&reg;</td> </tr> <tr> <td>/</td> <td>slash</td> <td>/</td> </tr> <tr> <td>™</td> <td>trademark</td> <td>&trade;</td> </tr> <tr> <td>¥</td> <td>yen</td> <td>&yen;</td> </tr> </tbody> </table>	Symbol	Description	HTML	&	and	&	£	British pound	£	•	bullet	•	©	copyright	©	°	degree	°	\$	dollar	\$	€	euro	€	¶	paragraph	¶	%	percent	%	®	registered	®	/	slash	/	™	trademark	™	¥	yen	¥	<p>WebAIM Designing for Screen Reader Compatibility</p> <p>Deque Punctuation and Typography Symbols</p>
Symbol	Description	HTML																																									
&	and	&																																									
£	British pound	£																																									
•	bullet	•																																									
©	copyright	©																																									
°	degree	°																																									
\$	dollar	\$																																									
€	euro	€																																									
¶	paragraph	¶																																									
%	percent	%																																									
®	registered	®																																									
/	slash	/																																									
™	trademark	™																																									
¥	yen	¥																																									

In-House Formatting Navigation

<p>Bucket pages</p> <ul style="list-style-type: none"> Pages are bucketed into intuitive categories to increase usability 	<p>CivicPlus Help Center: Bucket Structure</p>
<p>Navigation</p> <ul style="list-style-type: none"> Main Governing Board is housed in 2nd tier of the Government (or similar) mega menu and linked to as necessary under departments or other related pages Avoid using more than approximately 10 pages in 3rd tier or deeper 	<p>CivicPlus Help Center: Global Navigation</p>
<p>Site Map</p> <ul style="list-style-type: none"> Pages are alphabetized on site and navigation spreadsheet Navigation spreadsheet matches site map 	

In-House Formatting Module & Widget Consistency Titles

<p>Category Titles</p> <ul style="list-style-type: none"> Intuitively named Use title case and the ampersand symbol “&” in all category and field titles Larger sites with multiple categories can consistently use 2-level categories (example: “Main Topic - Sub Topic” “Police - Safety Tips”)

Modules & Widgets

<p>Agenda Center</p> <ul style="list-style-type: none"> House all agendas and minutes in Agenda Center (or follow client specification) Agendas should not show as amended Documents do not have to be renamed <p>Simple Agendas - Single PDF Agendas</p> <ul style="list-style-type: none"> Description: “Board Name” “Meeting Type” “Document” “- Meeting Status” (PDF) <p>Complex Agendas - Agendas made of items</p> <ul style="list-style-type: none"> Description: “Board Name” “Meeting Type” “Document” “- Meeting Status” Agenda should be first item, followed by meeting materials Agenda uploaded to item named “Agenda” Other documents uploaded to item named “Meeting Materials” <p>HTML Agendas - Agendas made of text linked to documents</p> <ul style="list-style-type: none"> Description: “Board Name” “Meeting Type” “Document” “- Meeting Status” Document should be uploaded into the Document Center using folder structure: Board Name Meeting Documents> 	<p>CivicPlus Help Center: Agenda Center Best Practices</p> <p>CivicPlus Help Center: Agenda Center Naming Conventions</p>
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<ul style="list-style-type: none"> Year>Month Create item named "Agenda" paste text from agenda into the description, create links in text to documents in housed in Document Center 	
<p>Archive Center</p> <ul style="list-style-type: none"> House reoccurring dated documents (example: budgets, newsletters, press releases etc.) Document titles should be consistent within categories and include date (example: "October 2014 Monthly Report (PDF)") Order items by date Add file extensions to all documents Use Month Day, Year format for dates document titles (example: "December 31, 2020") 	CivicPlus Help Center: Archive Center Best Practices
<p>CivicMedia™</p> <ul style="list-style-type: none"> Use intuitive folder and file names Leave a client note for video or audio recordings that do not have text transcript or captioning 	
<p>Document Center</p> <ul style="list-style-type: none"> Use intuitive folder and document names Add file extension to all documents If a large number of documents has a uniform naming convention that does not impede usability, retain the client's naming convention Use format MM-DD-YYYY for dates in document titles (example: "12-31-2020 Meeting Information (PDF)") so documents will display chronologically in Document Center or Related Documents widget 	CivicPlus Help Center: Document Center Overview CivicPlus Help Center: Document Center Naming Conventions Best Practice
<p>Facilities</p> <ul style="list-style-type: none"> Do not enter 3rd party facilities; they should be added to resource directory Entries must have address or cross street to be added to Facilities module, if no address is provided leave a note for the client to populate Amenities should be populated in the Features section. Specific information about the features (number of, descriptions, etc.) can be added to the description <p>Facilities Images</p> <ul style="list-style-type: none"> If adding link to video, deselect open in new window Images should be at least 640 by 640 pixels to be used in the module, if images are smaller than this size, they can still be uploaded; note to the client to add larger images Images small than 250 by 250 pixels will not display in facilities list, but will display in the slideshow, these images can be uploaded, and a note should be left for the client If only one photo is uploaded, pagination and next arrows 	CivicPlus Help Center: Facilities Module Overview

<p>should not be turned on in slideshow</p>	
<p>FAQs</p> <ul style="list-style-type: none"> • Question and answer formatted content that is housed on a page (do not convert FAQs from documents unless specified by specialist) is added to the FAQ module • Include “next step” information • An answer can be up to 6 paragraphs with proper subheads; longer FAQs can be pared down to a blurb with a link to a content page 	<p>CivicPlus Help Center: FAQ Module</p>
<p>Form Center</p> <ul style="list-style-type: none"> • Do not use place holder text in short or long answer boxes • Use uniform font text and colors • Use title case and appropriate punctuation in field labels, instructions, and options • Print Only forms must include a submission address on the form • Online form submission options match any submission instructions mentioned in client form; note to client to change information if needed • All links within the form should open in a new window to ensure information added to the form is not lost • All links to forms created within the form center should open in the same window (considered pages, not documents) • Do not create forms that require any of the following (leave note for client): <ul style="list-style-type: none"> • Bank account information • Birth certificate copy • Business ID numbers • Driver’s license numbers • Medical information • Passport numbers • Passwords • Routing numbers • Social Security numbers • Tax ID numbers • W2 or other tax documentation or information 	<p>CivicPlus Help Center: Form Center Overview</p>
<p>Info Advanced Module</p> <ul style="list-style-type: none"> • Use Info Advanced for 3rd party contact information only • Format should mimic Staff Directory formatting <p>Widget</p> <ul style="list-style-type: none"> • The Info Advanced widget is placed at the top of the Feature Column when used for contact information 	<p>CivicPlus Help Center: Info Advanced Module</p>
<p>Photo Gallery</p> <ul style="list-style-type: none"> • Leave a client note if not able to provide specific information about photos for alt text • All images should have titles and alt text; caption text can be 	<p>CivicPlus Help Center: Photo Gallery Overview</p>

<ul style="list-style-type: none"> populated based on client content Links should be created to Photo Galleries whenever possible 	
<p>Quick Links</p> <ul style="list-style-type: none"> Category titles should be intuitively named based on content of links Use file extension for links to documents Documents should open in new window 	<p>CivicPlus Help Center: Quick Links Best Practices</p>
<p>Resource Directory</p> <ul style="list-style-type: none"> If no address is listed, remove the city, state, and zip code information Select yes to link to map for all entries with an address Link: select open in same window Select at least one category that reflects the content of the entry 	<p>CivicPlus Help Center: Resource Directory Module</p>
<p>Staff Directory</p> <p>Module</p> <ul style="list-style-type: none"> All listings in alphabetical order Images should be 200 pixels wide or smaller Add all contact information for departments, offices, employees, etc. 3rd party employees or departments should be housed in Info Advanced Non-governing boards members should not be added to Staff Directory See Contact information section for how to format address <p>Category</p> <ul style="list-style-type: none"> Delete city, state, and zip code information if no address Map & Directions: select “Display a map and links for directions for the physical address” Contact forms should be used consistently across the project Show email as: Email department name Link: use relative department page link Link text: Department Name Page Brief Description: department or office hours or any additional information that cannot be placed in other category (example: additional phone numbers, fax numbers, after hours numbers, etc.) Hours formatting Hours (Subhead 2) Day through Day Time a.m. to Time p.m. <p>Item</p> <ul style="list-style-type: none"> Must include first and last name If using contact form make sure it is consistent across project Show email as: Email First Name Last Name Biography: for biographical information, additional contact information, etc. normal text formatting applies 	<p>CivicPlus Help Center: Staff Directory Best Practices</p>

<p>Widget</p> <ul style="list-style-type: none"> • Should always be at the top of the Feature Column • Staff <ul style="list-style-type: none"> • Never select “Biography” for staff members • Do not select “Link to staff in Staff Directory” unless there is information in the Biography text box in the module • Display staff information above department information • List staff based on rank or alphabetically by last name if more than one person <p>Departments</p> <ul style="list-style-type: none"> • Select “Description” if there is information in the Brief Description text box in the module • Never use the “All Employees” option • Display a link to the Staff Directory when department information is displayed 	
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Widgets

<p>Pages Widget</p> <ul style="list-style-type: none"> • Use Format 2 - Depth 1 to display links and page descriptions • Use Format 3 - Depth 1 for pages with repetitive page descriptions • Use Format 3 - Depth 2 for bucketed global pages such as How Do I • Use Format 4 - Depth 1 if the client has provided images or icons for subpages

Editing

<p>Capitalization</p> <ul style="list-style-type: none"> • Title case for <ul style="list-style-type: none"> • Category titles • Document titles • Pages titles • Subheads • Website names • Capitalize first word of each sentence, bullet, and item within table • Use client capitalization for job titles, departments, offices, local regions, proper nouns, etc.
<p>Punctuation</p> <ul style="list-style-type: none"> • Periods at end of all complete sentences
<p>Spacing</p> <ul style="list-style-type: none"> • Spacing should be consistent on pages and in modules • There should not be extra spaces between subheads and text • Slashes / and dashes - should not have a space on either side, except in page titles • Use the dash -, not the em — or en – dash