

SECTION

3

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# Sample Business Documents

## ABSTRACTS

An **abstract** is a summary of a larger document, such as a report. Abstracts are also called **summaries** or **executive summaries**.

There are two types of abstracts:

- **Descriptive abstracts** are short summaries that appear on the front page of a formal report or journal article. (Figure 3.1.)
  - A descriptive abstract does not summarize the facts or conclusions of the report.
  - A descriptive abstract introduces the report and explains what the report covers.

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**Example:** This report provides recommendations for the antivirus software currently available.

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- **Informative abstracts** summarize the key facts and conclusions of the report. (Figure 3.2.)
  - Informative abstracts are usually one- or two-page documents.
  - Informative abstracts summarize each of the sections in the report.
  - Sentence structure is normally complex and packed with information.
  - An informative abstract is intended to allow readers to determine whether they want to read the report.
  - An informative abstract is not treated as an introduction.
  - Include any statistical details in an informative abstract.

**Figure 3.1** Descriptive Abstract

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**Abstract**

The U.S. Air Force Research Laboratory has been developing cost effective methods for gathering occupational and training requirements information. This information has most often been collected at an individual level of analysis focusing on the more behavioral aspects of work. Recent interest in both team and cognitive requirements for work has prompted renewed interest in team task analysis and accurately representing knowledge and cognitive components of work. The U.S. and Allied Military Services have pioneered the development of exemplar methods that serve as the foundation for recent advanced training. This paper highlights recent explorations and advanced training in team task analysis and cognitive task analysis methods. Implications for increasing the accuracy and efficiency of the requirements analysis process will also be discussed.

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(Courtesy of the United States Air Force)

**Figure 3.2** Informative Abstract

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**Summary**

The U.S. Fish and Wildlife Service published special rules to establish nonessential experimental populations of gray wolves (*Canis lupus*) in Yellowstone National Park and central Idaho. The nonessential experimental population areas include all of Wyoming, most of Idaho, and much of central and southern Montana. A close reading of the special regulations indicates that, unintentionally, the language reads as though wolf control measures apply only outside of the experimental population area. This proposed revision is intended to amend language in the special regulations so that it clearly applies within the Yellowstone nonessential experimental population area and the central Idaho nonessential experimental population area. This proposed change will not affect any of the assumptions and earlier analysis made in the environmental impact statement or other portions of the special rules.

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(Courtesy of the United States Environmental Protection Agency)

## ACCEPTANCE LETTER

An **acceptance letter** is often written to formally acknowledge an employment offer, the receipt of a gift, or the appointment to a public office. An acceptance letter can also be written to formally accept someone else's resignation.

Consider these tips when writing an acceptance letter (Figure 3.3):

- Begin the letter by thanking the person, business, or organization.
- Identify what you are accepting and explain what it means to you.
- Thank anyone who assisted you.
- State the terms as you understand them.
- If accepting an employment offer, summarize the start date, job title and description, compensation, benefits, and vacation days offered.
- Use a positive tone.
- Be gracious by showing your courtesy, tact, and charm in your writing style.
- Restate your thanks and appreciation in the closing of the letter.
- Use the spelling checker in your word processor to check for spelling errors.
- Read the letter for clarity and to check for grammatical mistakes.

Acceptance letters are typically written to accept:

- An invitation to a social event
- A job offer
- A request to serve in an honorary position
- A resignation
- An honor
- An invitation to a business appointment
- An invitation to speak
- A gift
- A proposal

**Figure 3.3** Acceptance Letter

Evelyn Wauson  
4212 West Church Street  
Houston, Texas 77096  
(713) 555-5555

October 20, 2011

Dear Mr. Harrison,

It was a pleasure speaking with you on the phone this afternoon. I am very happy to accept the position of LMS supervisor with Harrison Consultants. Thank you very much for the opportunity to join your team. I am excited about the possibilities for this position, and I am eager to work on the implementation of your new learning management system and corporate online university.

As we discussed in our conversation, my starting yearly salary will be \$50,000. I understand that after being employed for 30 days, I will receive health, dental, and life insurance benefits. After working for Harrison Consultants for six months, I will receive one week's paid vacation.

I am prepared to start work on December 1, 2011 as you requested. If there is any paperwork I need to complete before I start work, or if you need any additional information, please contact me.

I appreciate the help your associate Ken Knox provided by referring me to you for this position.

Thank you.

*Evelyn Wauson*  
Evelyn Wauson

## ACKNOWLEDGMENT LETTER

An **acknowledgment letter** is a response that clarifies what is expected from you. An acknowledgment letter should be sent within two days of receiving the original letter, report, order, or request.

Consider these tips when writing an acknowledgment letter (Figure 3.4):

- Include a short apology if the acknowledgement letter is delayed.
- If you are responding to a complaint, be courteous and apologize for any inconvenience or problem.
- Be sincere.
- The letter should be addressed to a specific person if possible.

Acknowledgment letters are typically written to:

- Accept a request to serve in an honorary position or a resignation.
- Express appreciation for a suggestion.
- Acknowledge a customer's order or donation or payment of an overdue balance.
- Acknowledge the receipt of a report or letter, the receipt of a résumé, or the return of an item for refund, exchange, or credit.
- Confirm an appointment or meeting, a business agreement, or an error, revision, or correction.
- Celebrate an anniversary of employment.

**Figure 3.4** Acknowledgment Letter

Isha Foundation  
951 Isha Lane  
McMinnville, TN 37110

August 20, 2011

Jeff Collins  
3111 North Amber Lane  
Nashville, TN 37213

Subj.: Tax Year 2011

Dear Mr. Collins,

Thank you for your recent donation of \$500 for our outreach program, Isha Care. Your gift will allow us to continue our efforts to provide free medical care to the residents of rural Tennessee.

Your donation is fully tax-deductible, and this letter may serve as a receipt for your tax records. This letter also verifies that you have not received any tangible benefits in return for your donation.

Your generous gift assures a continued investment in the future of Tennessee.

Thank you.

*Dr. Jane Morgan*

Dr. Jane Morgan  
President, Isha Foundation Inc. USA

## ADJUSTMENT LETTER

**Adjustment letters** are responses to written complaints. The purpose of such letters is to acknowledge the complaint. The letter is also a legal document that records what action will be taken.

Consider these tips when writing an adjustment letter (Figure 3.5):

- Reference the date of the original complaint letter.
- The letter should review the facts of the case and offer an apology for any inconvenience.
- When there is no truth to the complaint, courteously explain the reasons as clearly as possible.
- When the customer's request is denied, offer some compensation or advice.
- Take a positive approach to the letter to counter any negative feelings of the reader.
- The solution is more important than the reasons why something occurred.
- Cordially conclude the letter and express confidence that you and the reader can continue doing business.

Adjustment letters are typically written to apologize for:

- A defective or damaged product
- A missed deadline
- Making a mistake on a customer's account
- A shipping error
- Damaged property
- Poor quality or service



**Figure 3.5** Adjustment Letter

Snack Makers, Inc.  
1234 West Main Street  
Los Angeles, CA 90036

April 20, 2012

Mr. Carl Luntz  
Store Manager  
Luntz Grocery  
2411 Third Avenue  
Atlanta, GA 30134

Dear Mr. Luntz:

I would like to apologize for the damaged shipment of Humus Chips. At Snack Makers, we always try to package our product as securely as possible, but it appears this time we failed.

We have shipped a replacement case of Humus Chips today at no charge. You should receive them within two days. There's no need to return the damaged product. You may dispose of the crushed chips anyway you wish.

Being a new company with a new product, we want you to know that we value your business and will do everything we can to make sure this doesn't happen again.

In addition, I am crediting your account for \$155 to reflect a 20% discount off your original order.

I hope you will accept my apologies and will continue to do business with Snack Makers.

Sincerely,

*Morton Boyd*

Morton Boyd  
President  
Snack Makers, Inc.

## ANNOUNCEMENT LETTER

**Announcement letters** should be written in a straightforward and concise style so that readers can get information quickly.

Consider these tips when writing announcement letters (Figure 3.6):

- For positive announcements, make the letter inviting and to the point.
- Build morale, confidence, and goodwill.
- When announcing achievements, try to motivate others to achieve the same goals.
- Use the announcement to promote your business.
- Include enough information so that you don't have to answer questions about the announcement later.
- When announcing bad news, be considerate and respectful.

Announcement letters are typically written to announce:

- A new address
- A change in company name
- The business schedule
- A new hire or promotion
- An employee's special achievement
- A retirement
- A new product
- A new store opening
- A layoff
- A store closing
- A new policy
- A contest winner
- A price change
- Bad news to employees
- A training session

**Figure 3.6** Announcement Letter

System Golf Supplies  
4143 Green Avenue  
Baltimore, MD 21205

May 22, 2012

Ms. Susan Jones  
Manager  
Jones Golfing  
1322 North Pleasant Street  
Baltimore, MD 21075

Dear Ms. Jones:

Due to increased costs for materials used in our manufacturing process, we must unfortunately increase the wholesale cost of our products. We have examined other ways to reduce our manufacturing costs; however, we have been unable to reduce costs enough without sacrificing quality. To maintain the superior quality of our products, we must raise our prices. I have enclosed a new price list that will go into effect on July 1, 2012. Any orders placed between now and July 1 will be honored at our previous prices.

We want to thank you for your business in the past, and we hope you understand the necessity for this increase.

Sincerely,

*Carl Richardson*

Carl Richardson  
Sales Manager  
System Golf Supplies

## ANNUAL REPORT

An **annual report** is a document used to disclose corporation information to shareholders—a state-of-the-company report. All U.S. companies that issue publicly traded stock are required to file an annual report with the Securities and Exchange Commission (SEC). The document that is filed with the SEC is the Form 10-K.

Many nonprofit organizations, foundations, and charities produce annual reports to assess their performance. Nonprofit annual reports include the following sections (Figures 3.7–3.11):

- Letter from the chairman of the board
- A description of the charity, its causes, actions, and accomplishments for the year
- The financial statement:
  - A letter from the organization's CPA
  - Income statement
  - Balance sheet
- A list of directors and officers

If a company is privately owned but has more than 500 shareholders and over \$10 million in assets, it is also required to file an annual report.

In addition to Form 10-K annual reports, the same mandated corporations must also file a quarterly Form 10-Q as a quarterly report.

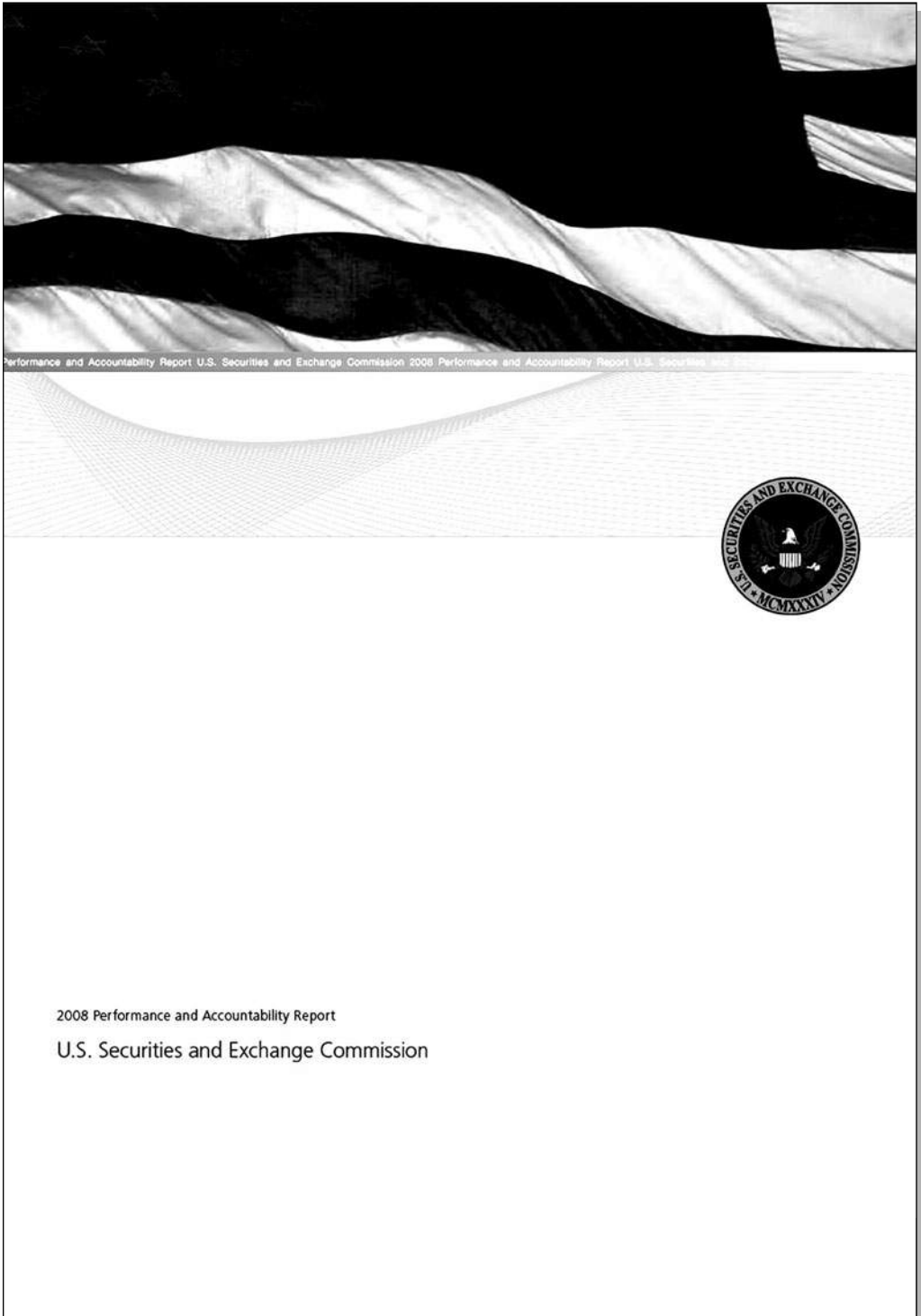
The annual reports required by the SEC follow a strict format and include the following sections (Figures 3.7–3.11):

- Business overview
- Risk factors
- Unresolved staff comments
- Properties
- Legal proceedings

- Submission of matters to a vote by shareholders
- Market for the company's common equity
- Related stockholder matters
- Management's discussion and analysis of financial conditions and the results of operations
- Disclosures about market risk
- Financial statements and supplementary data
- Changes in accounting
- Controls and procedures
- Other information
- Directors, executive officers, and corporate governance
- Executive compensation
- Security ownership of stock by management and certain beneficial owners
- Relationships and related transaction and director independence
- Accounting fees and services
- Exhibits and financial statement schedules

*(text continues on page 444)*

Figure 3.7 Annual Report Cover Page



(Courtesy of the U.S. Securities and Exchange Commission)

Figure 3.8 Annual Report Table of Contents

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(Courtesy of the U.S. Securities and Exchange Commission)

Figure 3.9 Annual Report Letter from the Chairman

## Message from the Chairman



**Christopher Cox**  
Chairman

Dear Investor,

The mortgage meltdown and ensuing global credit crisis during the past year have confronted our markets with unprecedented challenges. The government's response to the financial turmoil has been equally unprecedented: the Federal Reserve and the Department of the Treasury have together committed over one trillion dollars in taxpayer funds to support insurance companies, banks, thrifts, investment banks, and mortgage giants Fannie Mae and Freddie Mac.

The Emergency Economic Stabilization Act (EESA), signed into law in October 2008, gives the Chairman of the SEC a formal oversight role with respect to the Troubled Asset Relief Plan administered by the Department of the Treasury. In addition, the Housing and Economic Recovery Act of 2008 gives the SEC Chairman similar oversight and advisory responsibilities with respect to the conservatorship of Fannie Mae and Freddie Mac supervised by the Federal Housing Finance Agency. These duties come in addition to the new responsibilities the SEC is already discharging as the statutory regulator of credit rating agencies, and the mandate that the EESA has given the agency to report by January 1, 2009, on the results of a congressionally-mandated study of fair value accounting.

### Response to the Credit Crisis

The agency has taken a number of other actions in recent months to address significant issues that have arisen in the credit crisis. When the auction rate securities market froze early in 2008, the Enforcement Division immediately commenced investigations of potential securities law

violations by the largest sellers of these instruments. Preliminary settlements were reached in principle with six of the largest firms, which would return more than \$50 billion to injured investors and make these settlements, when concluded, by far the largest in the agency's history. (While settlements in principle were reached during FY 2008, the amounts were not included in the enforcement statistics for this report because they were not finalized by the close of the fiscal year on September 30.)

As of the close of FY 2008, the Commission had over 50 pending subprime-related investigations involving lenders, investment banks, credit rating agencies, insurers, and broker-dealers. During the past year the SEC charged the managers of two Bear Stearns hedge funds in connection with last year's collapse of those funds. The Commission returned \$356 million to investors harmed when Fannie Mae issued false and misleading financial statements. And the Division of Enforcement is currently in the midst of a nationwide investigation of potential fraud and manipulation of securities in some of the nation's largest financial institutions through abusive short selling and the intentional spreading of false information.

As part of this aggressive law enforcement investigation into potential manipulation during the subprime crisis, the Commission approved orders requiring hedge funds, broker-dealers and institutional investors to file statements under oath regarding trading and market activity in the securities of financial firms. The orders cover not only equities but also credit default swaps. To assist in analyzing this information, the SEC's Office of Information Technology is working with the Enforcement Division to create a common database of trading information, audit trail data, and credit default swaps clearing data. Our Office of Economic Analysis is also supporting this effort by helping to analyze the data across markets for possible manipulative patterns in both equity securities and derivatives.

During FY 2008, the Enforcement Division also brought the highest number of insider trading cases in the agency's history. In addition, the SEC brought a record-high number of enforcement actions against market manipulation in 2008, including a precedent-setting case against a Wall



Figure 3.10 Annual Report Organizational Overview

## Vision, Mission, Values, and Goals

### Vision

The Securities and Exchange Commission (SEC) aims to be the standard against which federal agencies are measured. The SEC's vision is to strengthen the integrity and soundness of U.S. securities markets for the benefit of investors and other market participants, and to conduct its work in a manner that is as sophisticated, flexible, and dynamic as the securities markets it regulates.

### Mission

The mission of the SEC is to protect investors; maintain fair, orderly, and efficient markets; and facilitate capital formation.

### Values

In managing the evolving needs of a complex marketplace and in pursuing its mission, the SEC embraces the following values:

- Integrity
- Accountability
- Fairness
- Resourcefulness
- Teamwork
- Commitment to Excellence

### Goals

#### • Enforce compliance with federal securities laws

The Commission seeks to detect problems in the securities markets, prevent and deter violations of federal securities laws, and alert investors to possible wrongdoing. When violations occur, the SEC aims to take prompt action to halt the misconduct, sanction wrongdoers effectively, and, where possible, return funds to harmed investors.

#### • Promote healthy capital markets through an effective and flexible regulatory environment

The savings and investments of every American are dependent upon healthy capital markets. The Commission seeks to sustain an effective and flexible regulatory environment that will facilitate innovation, competition, and capital formation to ensure that our economy can continue to grow and create jobs for our nation's future. Enhancing the productivity of America is a key goal that the SEC works to achieve by increasing investor confidence in the capital markets.

#### • Foster informed investment decision making

An educated investing public ultimately provides the best defense against fraud and costly mistakes. The Commission works to promote informed investment decisions through two main approaches: reviewing disclosures of companies and mutual funds to ensure that clear, complete, and accurate information is available to investors; and implementing a variety of investor education initiatives.

#### • Maximize the use of SEC resources

The investing public and the securities markets are best served by an efficient, well-managed, and proactive SEC. The Commission strives to improve its organizational effectiveness by making sound investments in human capital and new technologies, and by enhancing internal controls.

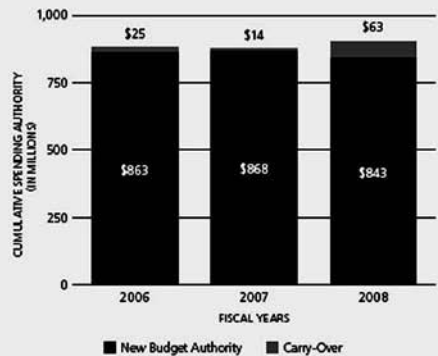
**Figure 3.11** Annual Report Overview of Organization's Performance

## Financial and Performance Highlights

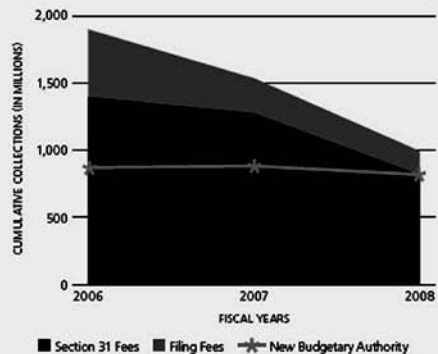
- In FY 2008, the SEC was authorized by Congress to spend \$906 million, a 2.8 percent increase over the \$881.6 million authorized in FY 2007. Funding was offset by fees collected by the SEC. Of the total authority, \$843 million was new budgetary authority and the remaining \$63 million was carried over from prior year unobligated balances, as illustrated in *Chart 1.2*.
- In FY 2008, the SEC reduced its year-end unobligated balance over previous levels through rigorous oversight and management of budgetary resources made possible by improvements in technology such as the agency's budget and performance tool.
- The SEC employed 3,511 FTE in FY 2008. This represents an increase of 46 FTE over FY 2007.
- In 2002, Congress set by law the aggregate amounts the SEC is to collect annually through fees. These target amounts generally exceed the level of funding appropriated to the SEC, and are used by Congress to offset SEC and other federal spending.
- In order to meet the offsetting collections target in FY 2008, the SEC lowered the rates of fees it collects on securities transactions on the exchanges and certain over-the-counter markets. Additional discussion of the fees collected by the SEC can be found in *Note 1.L. Accounts Receivable and Allowance for Uncollectible Accounts* on page 66, and *Note 1.S. Revenue and Other Financing Sources* on page 68.
- While the transaction fee rate was cut by more than half from this time last year, there was significantly more transactional volume compared to last year. Therefore, the total collections dropped only 36 percent. In accordance with law, the SEC collected fees in excess of its appropriations from Congress. However, the excess amount is declining, as illustrated in *Chart 1.3*.

**CHART 1.2**

Spending Authority by Source

**CHART 1.3**

Offsetting Collections vs. New Budgetary Authority



## APPLICATION LETTER

In an **application letter** (Figure 3.12):

- In the first sentence, state what you are applying for.
- Explain the reasons you are applying and be specific.
  - Give the reasons why you are qualified including your experience, qualifications, accomplishments, and goals.
- Identify the response you would like to your letter.
- Identify the date you need a response.
- Reference any other materials included with the letter, such as a résumé, job application form, letters of recommendation, or work samples.
- Include your contact information and when you are available.
- Close the letter with a thank you.

Application letters are typically written to apply for:

- Employment
- Admission to a school
- Admission to a club
- A foreign work permit
- A grant
- A scholarship
- A travel visa
- A special program
- Credit

**Figure 3.12** Application Letter

1322 Forest Lane  
Dallas, TX 75214  
August 11, 2012

Michele Phillips  
APS Software  
13211 Greenville Avenue  
Dallas, TX 75212

Dear Ms. Phillips:

I am writing to apply for the position you advertised on Monster.com for a quality control manager. As you will see in my résumé, I have the experience to fill this position.

For the past ten years, I have been working in the information technology department at Hopewell Industries where I have been a software developer, project manager, and manager of QC Testing. My experience has ranged from coding, to managing teams of programmers, to creating test plans, running tests, and managing testers.

Recently, Hopewell Industries decided to outsource the IT function to IBM. While I am sad to leave the company, I am looking forward to a new assignment with fresh faces and new projects.

I have heard about APS Software in various trade journals and would be very interested in becoming part of your team. APS is well known for innovative quality products, and I am excited about the possibility of becoming a part of your success story.

I hope you'll give me an opportunity to discuss my qualifications and experience. I can be reached at (214) 555-5555 after 6 p.m.

Thank you very much for your consideration for this position.

Sincerely yours,  
*Alice Grassley*  
Alice Grassley

Encl.: résumé

## BROCHURES

**Brochures** are often used by businesses to advertise products and services. There are several different types of brochures:

- Leave-behind brochures are left after a personal sales presentation.
  - These focus on a full description of the product and its benefits.
  - They echo the sales pitch given by the salesperson.
- Point-of-sale brochures are designed to catch your interest while waiting in line to check out in a store.
  - They are visually appealing with a catchy headline.
- Inquiry response brochures are sent to people who have asked for information about a product.
  - These brochures focus on a sales pitch that encourages the reader to take the next step and purchase the product or service.
- Direct mail brochures are sent to potential customers along with a sales letter.
- Sales support brochures are used by salespeople during their presentations.

In the planning phase of brochure creation, consider the following:

- Determine what you want the brochure to do: get orders, inform, get appointments.
- Determine the audience for the brochure and why they should be interested in your product or service.
- Develop an outline and divide the content you want to cover into sections.
- Consider the style of brochure you plan to create, and think about the content that is best for the cover, inside pages, and back cover.
  - Also consider content that is suitable for any sidebars.
- Determine whether photography or illustrations can be used.
  - If photography is used, also include captions for each photo that focus on benefits.
  - Photos should be at least 300 dpi resolution in order to print with the best possible print quality.

When writing copy for a brochure, keep the following in mind (see Figures 3.13–3.14):

- Write from the reader’s point of view.
  - As the reader unfolds the brochure, present the information in the order that a reader would want to receive it.
  - On the cover or first page of the brochure, motivate readers to open the brochure and seek out additional information.
- For a brochure longer than eight or more pages, include a list of contents highlighted in bold and separated from the rest of the copy.
- Describe the product or service in terms of what it means to the potential customer.
  - Focus on the benefits rather than the features.
- Include helpful reference information that will make the reader want to keep the brochure on file.
- Write in an informal matter-of-fact style, as if you are having a one-on-one conversation with someone.
- Share your emotions and enthusiasm about the product or service.
- Don’t waste time on all the details; instead, focus on the key selling points.
- Organize the content into easily identifiable sections.
- Ask for an order and provide simple instructions on how to order.
- Make a persuasive sales pitch.

In designing the brochure and doing the layout, consider the following:

- Study brochures from other companies and determine which designs are effective and which are not.
- Avoid packing in too much content.
  - Empty space is okay.
- Avoid using too many graphical boxes and lines to separate chunks of content.
  - They tend to make your design look cluttered.
- Use a consistent typeface throughout the brochure.

- You can change fonts within the same typeface family in various places for emphasis.
- Consider different fonts, font styles, sizes, and colors for key selling points and headings.
  - Use these techniques sparingly for greater emphasis.
  - Avoid all caps. Use bold style instead.
  - Avoid underlining. Use italics style instead.
  - Avoid putting text over images unless you make the image at least 80% transparent.
  - Avoid putting text columns on the first page or cover.
  - Use no more than 10 words on the cover.
  - Don't use more than two or three sentences per paragraph with a layout that is no more than nine or ten lines of type.
  - Add a space between paragraphs and do not indent the first word.
  - Use only one space after a period before starting the next sentence.
- If you have to start a sentence with a number, write it out.

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**Incorrect:** 50% of the homeowners experienced hail damage.

**Correct:** Fifty percent of the homeowners experienced hail damage.

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- Consider the use of multiple ink colors and colored paper.
- When creating a layout with photography, don't position the photos so that they are creased by a fold in the paper.
- Use desktop publishing software such as Microsoft Publisher, Adobe InDesign, or QuarkXPress.
  - Set the paper size before any design elements are created.
  - Confirm that the printer will be able to print on the intended size paper.
- Allow for print bleed in order to achieve edge-to-edge printing.
  - To create print bleed, expand your brochure design slightly beyond the edge of the paper with nonessential design elements to allow for trimming.
- Proofread your final design several times to avoid printing a brochure with a mistake or typo.

Figure 3.13 Brochure

**Participants**

Centers for Disease Control and Prevention  
 Central Intelligence Agency  
 Consumer Product Safety Commission  
 Department of Agriculture  
 Department of Army  
 Department of Commerce  
 Department of Education  
 Department of Energy  
 Department of Health and Human Services  
 Department of Housing and Urban Development  
 Department of Interior  
 Department of Justice  
 Department of Labor  
 Department of Navy  
 Department of State  
 Department of Transportation  
 Department of the Treasury  
 Department of Veterans Affairs  
 Environmental Protection Agency  
 Federal Bureau of Investigation  
 Federal Emergency Management Agency  
 Federal Trade Commission  
 Food and Drug Administration  
 General Services Administration  
 Government Printing Office  
 Internal Revenue Service  
 John F. Kennedy Center for the Performing Arts  
 Library of Congress  
 National Academy of Sciences  
 National Aeronautics and Space Administration  
 National Archives and Records Administration  
 National Endowment for the Arts  
 National Endowment for the Humanities  
 National Gallery of Art  
 National Institutes of Health  
 National Oceanic and Atmospheric Administration  
 National Park Service  
 National Science Foundation  
 National Security Agency  
 Nuclear Regulatory Commission  
 Office of Personnel Management  
 Peace Corps  
 Securities and Exchange Commission  
 Smithsonian Institution  
 Social Security Administration  
 U.S. Courts  
 U.S. Geological Survey  
 U.S. International Trade Commission  
 U.S. Holocaust Memorial Museum  
 U.S. Patent and Trademark Office  
 U.S. Supreme Court

**www.ed.gov/free**  
 Resources for Teachers, Parents, and Students

"One of the 16 best federal sites on the Web."  
*Government Executive*

"A gold mine of information."  
*The Washington Post*

"The absolute BEST Web site for using  
 technology in the classroom!"  
*Fifth-Grade Science Teacher*


"Sometimes the government gets it right.  
 You made that happen."  
*Director of a Nonprofit Organization*



Federal Resources for Educational Excellence  
 U.S. Department of Education  
 Office of the Under Secretary  
 Office of Intergovernmental  
 and Interagency Affairs  
 400 Maryland Ave., S.W.,  
 Washington, DC 20202-0498  
[free@ed.gov](mailto:free@ed.gov)

**Federal Resources for  
 Educational Excellence**





**FREE**  
[www.ed.gov/free](http://www.ed.gov/free)

## Federal Resources for Educational Excellence

**Teachers, Parents, and Students—**  
**FREE** makes it easy to find learning resources from more than 35 federal organizations. Resources include teaching ideas, learning activities, photos, maps, primary documents, data, paintings, sound recordings, and more—on thousands of topics...

The Constitution, photosynthesis, probability, American writers, women's suffrage, the Renaissance, the Great Depression, Thomas Jefferson, epidemiology, the human genome, geology, cells, sun-earth connections, the Civil War, African-American history, jazz, aerospace careers, genealogy, immigration, poetry, calculus, water in Africa, and more.

**FREE** is among the federal government's most popular education Web sites because it offers one-stop access to learning resources developed by...

- Library of Congress
- NASA
- National Archives and Records Administration
- National Endowment for the Humanities
- National Gallery of Art
- National Park Service
- National Science Foundation
- Peace Corps
- Smithsonian Institution
- And other federal agencies and organizations.

Each week day, you'll find a new resource featured on the FREE home page, such as...

- **School-Home Links**, part of the *Compact for Reading*, provides 400 activities for strengthening children's reading and writing skills in grades K-3.
- **Valley of the Shadow** looks at the Civil War through soldiers' letters, news articles, and other information from two communities separated by the Mason-Dixon line.
- **The Math Forum** highlights a Problem of the Week, Ask Dr. Math, Web units, and more.
- **Constitutional Community** presents lessons around images of the American Revolution, Civil War, and 33 other topics.
- **Find Out Why** explains why baseballs fly off bats, what makes playground slides slippery, and why hurricanes happen.
- **Art for the Nation** examines the works, techniques, and lives of more than a dozen famous artists.

(Courtesy of the U.S. Department of Education)



Figure 3.14 Brochure

*"I was very satisfied with the process and I think all the managers would agree with that. The outcome was far better than anything that could have been obtained through administrative proceedings."*  
 Mike Godfrey,  
 Senior Vice President and  
 General Counsel, FINA.

*"I have been involved in four separate mediations conducted by the EEOC. I think the process is effective and efficient, particularly when an employee is still employed by the respondent."*  
 Julia Carter,  
 Arizona Center for Disability Law.

*"Our resolution rate in mediation between the EEOC and state and local agencies is 70 percent resolution at the table, and that typically is in the one-day mediation stage. You get it done and focus on resolution."*  
 Deborah Lilly,  
 Director of Fair Employment for  
 Giant Food, Inc.

Publication EEOC-BK-26

For a list of EEOC publications, or to order publications visit our website at [www.eeoc.gov](http://www.eeoc.gov) or write, call or fax:  
 U.S. Equal Employment Opportunity Commission  
 Publications Distribution Center  
 P.O. Box 12549  
 Cincinnati, Ohio 45212-0549  
 1-800-669-3362 (voice)  
 1-800-800-3302 (TTY)  
 513-489-8692 (fax)

U.S. Equal Employment Opportunity Commission  
 Washington, D.C. 20507

**MEDIATE!**  
**MEDIATE!**

Employment Discrimination Charges

**Fair,  
 Efficient  
 And  
 Everyone  
 Wins**

U.S. Equal Employment Opportunity Commission  
 Chairwoman Ida L. Castro

**What is Mediation?**

Mediation is a **FAIR** and **EFFICIENT** process to help you resolve your employment disputes and reach an agreement.

A neutral mediator assists you in reaching a voluntary, negotiated agreement.

---

**How does it work at the EEOC?**

The decision to mediate is completely voluntary for the charging party and the employer.

When a complaint is filed, the parties may be offered mediation.

If both the charging party and employer agree, mediation will be scheduled by an experienced mediator.

During mediation, both sides will be able to exchange information and express expectations for reaching resolution.

The parties work to reach common ground and resolve their differences. An agreement reached in mediation is as binding as any settlement reached through EEOC.

If an agreement is not reached, the case will be referred to EEOC's investigative process to be handled like any other case.

Information disclosed during mediation will not be revealed to anyone ... including other EEOC employees.

**Choose Mediation to Resolve Employment Discrimination Disputes**

Why labor through months of investigation or litigation?

---

**Mediation ...**

**IS FAIR AND NEUTRAL**  
 Parties have an equal say in the process and the parties decide the settlement terms. Not the mediator! There is no determination of guilt or innocence in the process.

**SAVES TIME AND MONEY**  
 Many mediated settlements are completed in one meeting and legal or other representation is permitted in all cases, but not required.

**IS CONFIDENTIAL**  
 All parties sign an agreement of confidentiality at the beginning of the process.

**AVOIDS UNNECESSARY LITIGATION**  
 Lengthy litigation CAN be avoided.

**Mediation promotes a better work environment, reduces costs and works for the employer AND the employee!**

---

**How Can I Learn More?**  
 For further information, visit our website at [www.eeoc.gov](http://www.eeoc.gov) or contact:  
**1-800-669-4000 (voice)**  
 or  
**1-800-669-6820 (TTY)**



This pamphlet is available in accessible formats for persons with disabilities.  
 Duplication of EEOC publications is permitted.

(Courtesy of the U.S. EEOC)

## BUSINESS LETTER

The parts of a **business letter** are (Figure 3.15):

- Address or letterhead—usually a preprinted letterhead with the organization’s name and address. (If letterhead is not used, include the address of the writer along with the date.)
- Dateline—two to six lines below the last line of the printed letterhead.
  - The date should be written out in this form: January 1, 2012 or 1 January 2012
  - The date can be centered if letterhead is used.
  - If letterhead is not used, the date is included with the address of the writer.
- Reference line—a numerical file number, invoice number, policy number, or order numbers on a new line below the date.
- Special mailing notations—special notations such as “Confidential” two lines below the date.
- Inside address—the addressee’s title and full name, business title, business name, and full address.
  - Do not abbreviate the company’s name unless it is registered that way.
  - Cities and states should not be abbreviated.
  - Do not use “care of” before a hotel name or company name.
  - Include the appropriate title: *Mr.*, *Ms.*, *Mrs.*, *Miss*, or *Dr.*
  - Business titles are never abbreviated.
- Attention line—one line space and the phrase “Attention: \_\_\_\_\_” after the inside address, if the letter is not addressed to any specific person.
  - You can make the letter go to the attention of a department.
  - An attention line is never used in a letter to an individual but only in a letter having plural addresses.
- Salutation—“Dear [person’s name],” “Ladies and Gentlemen,” “Dear Sir or Madam,” “Dear [company name]” one line after the attention line or the inside address.

- In business letters, the salutation is followed by a colon.
- In personal letters, the salutation is followed by a comma.
- Subject line—an overview of what the letter is about.
  - It can be used in place of a salutation.
  - A subject line can be centered in sales letters.
  - Do not include “Re” or “Subject” before the subject line.
  - Underline the subject line, unless it occupies two or more lines, in which case underline the last line, letting the underline extend the length of the longest line in the subject.
- Message—the body of your letter with paragraph breaks, optional indentions for paragraphs, bullet lists, and number lists.
- Complimentary close—two lines below the last line of the message.
  - The close is either left justified or five spaces to the right of center.
  - “Yours truly” or “Very truly yours” can be used when no personal connection exists between the writer and recipient.
  - “Sincerely” or “Sincerely yours” is appropriate when there is an established personal as well as business relationship.
  - “Respectfully yours” is appropriate on letters addressed to a person of acknowledged authority.
  - Avoid using closings such as “Yours for lower prices” or “I remain” or “Cordially yours.”
- Signature block—justified with the complimentary close with options of typed name and title, signature, or just signature.
  - Never add a blank graphical line for the writer’s signature.
  - A woman should include a courtesy title in her typed signatures to allow the recipient of the letter to reply appropriately.

---

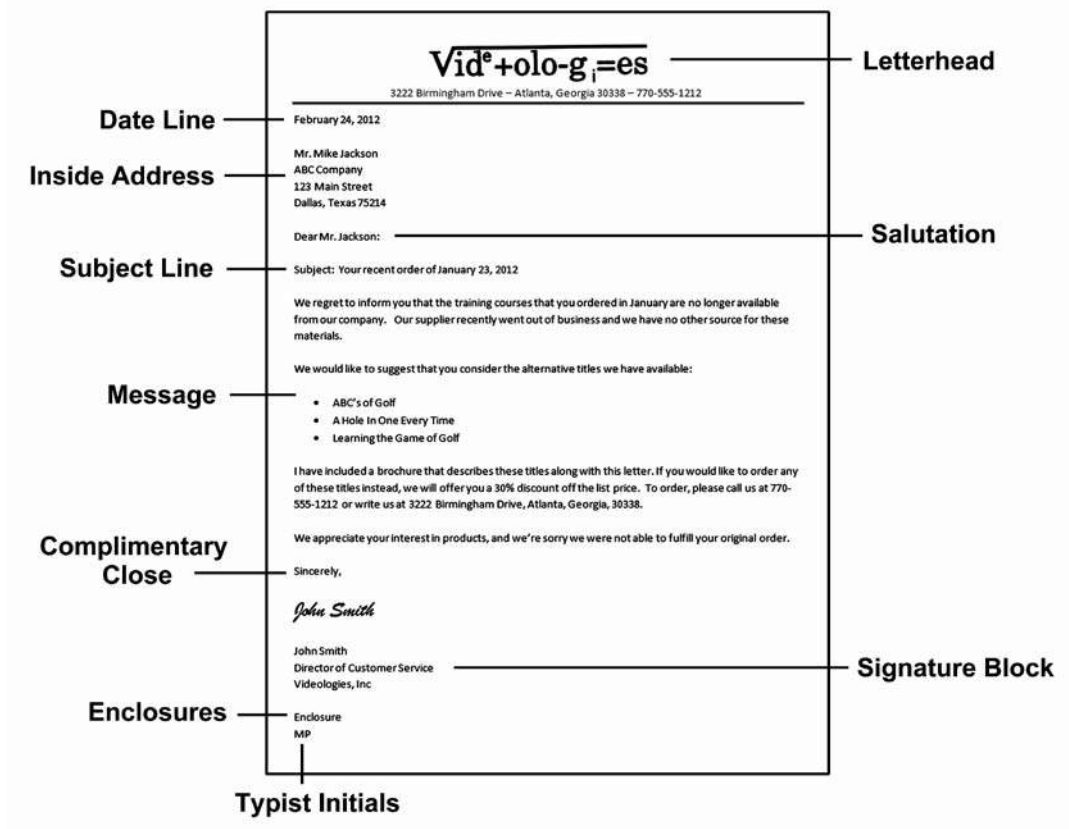
**Example:** Miss Louise A. Scott, Ms. Tina Anderson-Tate,  
Mrs. Pat Brueck

---

- Identification initials—the initials of the typist aligned left two spaces below the signature block.
  - Writer’s initials are typed in capitals; the typist’s initials are in lower case.

- A colon or slash is used to separate the initials.
- Enclosure notation—located with the identification initials or in place of them with the notation “enc,” “encl,” “enclosures (3),” or “3 encs.”
- Copy notation—left-aligned two lines below identification initials with the notation “cc: [person’s full name or initials].”
- Postscript—two spaces below the last text on the page with a “P.S.” and then a short sentence.
  - Use a postscript to dramatize something already included in the letter.
  - Never use a postscript to include something that was forgotten during the writing of the letter. Instead, rewrite the letter.

Figure 3.15 Parts of a Business Letter



## Business Letter Writing Style

Consider the following tips regarding business letter writing style:

- A good business letter advertises your capabilities and those of your company.
- A good business letter is neat and symmetrical, with no typographical, grammatical, or spelling errors.
- The language should be clear and simple.
- The first sentence should state the purpose of the letter.
- When responding to a letter, identify the subject and date of the previous letter in the first paragraph.
- Paragraphs should be short, and each paragraph should focus on a different topic.
- Use lists or italics where appropriate to make it easier for the reader to find important points.
- Focus on the reader's needs and interests.
- Avoid jargon.
- End with a call for action.

---

**Example:** Can we set up an appointment to discuss your needs on this project?

---

## Business Letter Format

There are several different formats for business letters:

- Block letters (Figure 3.16)
- Modified block letters (Figure 3.17)
- Modified semiblock letters (Figure 3.18)
- Simplified letters (Figure 3.19)

*(text continues on page 459)*

**Figure 3.16** Block Letter

5509 West 34th Street  
Dallas, TX 75214  
July 7, 2011

Michael J. Duffy  
Intelligent Computer Systems  
3121 Morris Lake Drive, Suite 211  
Dallas, TX 75212

Dear Mr. Duffy,

I am writing to apply for the position you advertised in the Dallas Morning News for an e-learning developer. As you'll see in my résumé, I have the experience to fill this position.

For the past five years, I have been developing e-learning courses for three different companies: IBM, ATT, and Cox Enterprises. My experience has ranged from instructional design, technical writing, graphics production, multimedia production, and learning management system support.

Currently, I am working as a contractor for Cox Enterprises, where I am finishing a one-year assignment developing training for Oracle Financials. I have also recently developed documentation and training for PeopleSoft and for Hyperion Planning. I am currently the lead instructional designer on the Oracle Financials project that will conclude at the end of July.

Intelligent Computer Systems is famous for your innovative IT security systems and networking products. I would be proud to be part of the ICS team. I hope you will give me an opportunity to discuss my qualifications and experience. I can be reached at (214) 555-1212 after 6 p.m.

Thank you very much for your consideration for this position.

Sincerely yours,  
*Jeff Watkins*  
Jeff Watkins

Encl.: résumé

**Figure 3.17** Modified Block Letter

	5509 West 34th Street Dallas, TX 75214 July 7, 2011
Michael J. Duffy Intelligent Computer Systems 3121 Morris Lake Drive, Suite 211 Dallas, TX 75212	
Dear Mr. Duffy,	
I am writing to apply for the position you advertised in the Dallas Morning News for an e-learning developer. As you'll see in my résumé, I have the experience to fill this position.	
For the past five years, I have been developing e-learning courses for three different companies: IBM, ATT, and Cox Enterprises. My experience has ranged from instructional design, technical writing, graphics production, multimedia production, and learning management system support.	
Currently, I am working as a contractor for Cox Enterprises, where I am finishing a one-year assignment developing training for Oracle Financials. I have also recently developed documentation and training for PeopleSoft and for Hyperion Planning. I am currently the lead instructional designer on the Oracle Financials project that will conclude at the end of July.	
Intelligent Computer Systems is famous for your innovative IT security systems and networking products. I would be proud to be part of the ICS team. I hope you will give me an opportunity to discuss my qualifications and experience. I can be reached at (214) 555-1212 after 6 p.m.	
Thank you very much for your consideration for this position.	
	Sincerely yours, <i>Jeff Watkins</i> Jeff Watkins
Encl.: résumé	

**Figure 3.18** Modified Semiblock Letter

5509 West 34th Street  
Dallas, TX 75214  
July 7, 2011

Michael J. Duffy  
Intelligent Computer Systems  
3121 Morris Lake Drive, Suite 211  
Dallas, TX 75212

**Subj.: E-learning developer position**

Dear Mr. Duffy,

I am writing to apply for the position you advertised in the Dallas Morning News for an e-learning developer. As you'll see in my résumé, I have the experience to fill this position.

For the past five years, I have been developing e-learning courses for three different companies: IBM, ATT, and Cox Enterprises. My experience has ranged from instructional design, technical writing, graphics production, multimedia production, and learning management system support.

Currently, I am working as a contractor for Cox Enterprises, where I am finishing a one-year assignment developing training for Oracle Financials. I have also recently developed documentation and training for PeopleSoft and for Hyperion Planning. I am currently the lead instructional designer on the Oracle Financials project that will conclude at the end of July.

Intelligent Computer Systems is famous for your innovative IT security systems and networking products. I would be proud to be part of the ICS team. I hope you will give me an opportunity to discuss my qualifications and experience. I can be reached at (214) 555-1212 after 6 p.m.

Thank you very much for your consideration for this position.

Sincerely yours,

*Jeff Watkins*  
Jeff Watkins

Encl.: résumé



**Figure 3.19** Simplified Letter

July 7, 2011  
5509 West 34th Street  
Dallas, TX 75214

**Subj.: E-learning developer position**

I am writing to apply for the position you advertised in the Dallas Morning News for an e-learning developer. As you'll see in my résumé, I believe I have the experience to fill this position.

For the past five years, I have been developing e-learning courses for three different companies: IBM, ATT, and Cox Enterprises. My experience has ranged from instructional design, technical writing, graphics production, multimedia production, and learning management system support.

Currently, I am working as a contractor for Cox Enterprises, where I am finishing a one-year assignment developing training for Oracle Financials. I have also recently developed documentation and training for PeopleSoft and for Hyperion Planning. I am currently the lead instructional designer on the Oracle Financials project that will conclude at the end of July.

Intelligent Computer Systems is famous for your innovative IT security systems and networking products. I would be proud to be part of the ICS team. I hope you will give me an opportunity to discuss my qualifications and experience. I can be reached at (214) 555-1212 after 6 p.m.

Thank you very much for your consideration for this position.

Sincerely yours,

*Jeff Watkins*  
Jeff Watkins

Encl.: résumé

## BUSINESS PLAN

A **business plan** is a proposal for new business or a strategy for expanding an existing business. A business plan includes (Figure 3.20):

- A detailed description of the product or service.
- Technical background information that explains the technologies involved.
- A discussion of the market for the new product or service, including how it compares to existing products and services currently available.
  - The sales of comparison products or services are listed along with projected sales of the new product or service.
  - The differences between the new product or service and existing similar products or services are detailed.
- The day-to-day operations of the business, including information about how the product or service is produced.
- Facilities and personnel that the business will require.
- Project revenues, along with supporting material for how the revenues projections were calculated.
- Funding requirements to get the business started.
- Legal issues involving competitors or government agencies.
- A feasibility section discussing the likelihood of success and the overall investment potential of the business.
- Investment documentation that details the amounts required for shareholder purchase.

The overall elements of the business plan document include:

- Cover sheet
- Statement of purpose
- Table of contents
- Description of the business

- Marketing information
- Competition
- Operating procedures
- Personnel
- Business insurance requirements
- Capital equipment and supply list
- Revenue projections
- Investment requirements
- Copies of résumés of all principals.

*(text continues on page 468)*

**Figure 3.20** Business Plan

## **STEWART LAKE STATE PARK BUSINESS PLAN**

*Submitted to:*

Department of Natural Resources  
Division of Parks and Recreation  
Office of the Director

*Prepared for the Director by:*

Stewart Lake State Park Superintendent  
*and*  
Division of Parks and Recreation Budget Officer  
Division of State Parks and Recreation

**Figure 3.20** *(continued)***EXECUTIVE SUMMARY/INTRODUCTION**

The purpose of the business plan is to assist park management and staff at Stewart Lake State Park in making decisions regarding the management, operation, and development of park resources. This plan focuses on the financial impacts of management decisions. Information from this document will be used to inform State park management and State legislators of financial impacts at Stewart Lake State Park.

**MISSION, VISION, VALUES, AND OBJECTIVES**

The mission, vision, values, and objectives of Stewart Lake State Park are as follows:

**Mission**

Enhance the quality of life through outdoor recreation, leisure, and educational experiences.

**Vision**

Provide quality outdoor recreational experiences through camping, boating, fishing, biking, hiking, and off-highway vehicle (OHV) trails.

**Values**

Meeting customer needs; innovation; clean and well-maintained facilities; preservation of natural surroundings and resources; affordable, safe, and accessible recreational activities.

**Objectives**

1. Increase overnight camping revenue (number of visitors and nights stayed)
2. Increase day-use revenues and visitation
3. Increase fishing activities and revenues

**Figure 3.20** (continued)**Market Trends**

General trends in outdoor recreation are as follows:

- Greater awareness of value of leisure—overall increased demand for leisure activities.
- Expectation of recreation facilities—more “comfort” oriented.
- Preference for individual or informal activities is increasing. People are looking for “experiences.”
- Participation by older adults in active recreation and sport has increased.
- Average age of outdoor recreation participant is increasing (baby boomers).
- Number of minority participants is increasing (most notably the Hispanic community).

**Market Needs/Demands**

The following needs and demands have been identified by park staff based on visitor feedback, trend analysis, and community comments for Stewart Lake State Park.

1. More, larger campsites/hookups for recreational vehicles (RVs)
2. Larger or additional boat ramp
3. Additional fish-cleaning stations (improve existing)
4. Added roads and “turn-around” for boat launching
5. Expanded parking for boats and day users
6. Protected docks (breakwater wall/marina)
7. Improve/expand bathrooms and showers
8. Expand “sandy” beach area for day users
9. Fuel station for boats
10. Improved bathrooms/showers at Knight Hollow and Indian Bay

11. More “accessible” water; expand culinary water system
12. Connect OHV trails to system outside of park
13. Improve OHV trails inside park
14. Develop group site for Knight Hollow (OHV users)
15. Add paved and non-paved trails for hiking and biking; link to city of Duchesne
16. Emphasize partnership with local businesses for food, rentals, and supplies—no concessionaire
17. Develop comfort camping facilities (i.e., yurts, cabins)

### **Financial Analysis**

The division staff evaluates potential projects, programs, events, etc., using return on investment (ROI) (the ratio of **money** gained or lost on an **investment** relative to the amount of money invested) and payback period as its methods to measure the acceptability of each project. For long-term capital projects, internal rate of return (IRR) (the annualized effective compounded return rate which can be earned on the invested capital, i.e., the **yield** on the investment) and/or net present value (NPV) measures the excess or shortfall of cash flows, in **present value** (PV) terms, once financing charges are met. By definition, net present value cash flow methods are used. As a standard of acceptability, project ROI must meet or exceed the current State Treasurer’s money market fund. Capital project IRR uses a hurdle rate of 3 percent and payback period of 30 years, or the estimated life of the structure/facility, whichever is less. It should be noted, however, that certain projects may be accepted even if the minimum criteria are not met based on such factors as environmental justice, safety, resource protection, heritage preservation, or division objectives.

*(continues)*

### Summary of Annual Expenses

Expense type	Current (\$)	Proposed (\$)	Net Effect (\$)
Wages and benefits	\$183,052	\$336,872	\$153,820
Operating supplies/maintenance	4,970	88,890	83,920
Utilities	10,425	23,725	13,300
Other costs (contractor/professional services)	2,250	9,600	7,350
Overhead	17,200	60,800	43,600
<b>TOTAL EXPENSES</b>	<b>\$217,897</b>	<b>\$519,987</b>	<b>\$301,990</b>

### Success Monitoring

The performance measures in the following table will be used to monitor and measure the success of the implementation of the above-mentioned strategies.

### Performance Measures

Goal	Action Item	Measure Description	Target Score or Range
Meet or exceed projected visitor use levels identified for camping, cabins, pavilions, boating, and day use	Promote new facilities as they are brought on line	Match or exceed projected revenues	Maintain or exceed projected use for 3 years
Organize and hold a fishing derby	Establish partnership with agencies, clubs, associations, and promoters	Schedule and follow through on a fishing derby	Hold an event each year for 3 years
Organize and hold a half triathlon	Establish partnership with agencies, clubs, associations, and promoters	Schedule and follow through on a triathlon	Hold an event each year for 3 years



## COLLECTION LETTER

**Collection letters** are written to collect amounts owed on a past-due account. When writing a collection letter, consider the following tips (Figure 3.21):

- Gather all the facts about the customer's account.
- Be specific about the amount owed and the date the funds were due.
- Let the customer know what the penalty will be if he or she fails to pay by a specific deadline.

---

**Example:** If your payment is not received by November 1, 2012, your account will be sent to a collection agency.

---

- Offer assistance for customers having difficulty paying. Discuss new terms or a payment plan.
- If you must cancel a customer's credit, explain your reasons for doing so.
- Be courteous, but firm.

Collections letters are typically written to:

- Remind a customer that a payment is past due.
- Demand payment for a delinquent account.
- Inform a customer that legal action will be taken for failure to pay.
- Appeal to a customer to settle an account.
- Inform a customer of new business terms due to their failure to pay.
- Offer a customer a payment plan.

## COMMENDATION LETTER

**Commendation letters** are often written to praise an employee's performance. Praise is a powerful motivator if it is genuine, specific, and timely. When writing a commendation letter, consider the following tips (Figure 3.22):

- Describe the work or accomplishment that deserves the commendation.
  - Use phrases such as “congratulations,” “exceptional job,” “very impressed,” “must compliment you,” “fine job,” “outstanding success,” “excellent quality,” “professional manager,” “your contribution,” “positive impact.”
- Describe the person's qualities that make him or her successful.
  - Use words such as *competence, expertise, diligence, commitment, enthusiastic, contribution, willingness, dedication, professional, extra time and effort, pride, invaluable, initiative, talent, leadership, ability.*
- Thank the person for his or her contribution to the organization.
  - Use phrases such as “job well done,” “commend you,” “vital to our success,” “an asset to our company,” “continued success,” “further recognition,” “thank you,” “keep up the good work,” “best wishes,” “made the difference.”

Commendation letters are typically written to:

- Praise an employee's performance.
- Compliment an employee from another organization.
- Praise a product or service.
- Compliment a guest speaker.
- Praise a salesperson from a supplier.
- Praise a chairperson or meeting planner.
- Compliment an instructor.
- Praise an employee's family for the employee's success.

**Figure 3.22** Commendation Letter

Best Value Realty Company  
4413 Lake Forest Drive  
Woodstock GA 30189  
October 22, 2012

Jack Moyer  
1442 Pine Cliff Tarn  
Woodstock, GA 30189

Dear Jack:

I wanted to congratulate you for achieving one million dollars in total sales this year.

In the history of Best Value Realty Company, we've only had two agents achieve this lofty goal. I would like to commend you for joining this elite group.

Your dedication in making cold calls, your helpful attitude when talking with homeowners, and your ability to help homeowners and buyers reach an agreement have all assisted you in achieving this outstanding success.

I want you to know that your efforts are vital to the success of Best Value Realty Company. You are indeed an asset to our company. Keep up the good work.

Sincerely yours,  
*Sherry Morgan*  
Sherry Morgan  
President

**Figure 3.23** Complaint Letter

Leon Williams  
14 Candler Avenue  
Atlanta, GA 30311

August 8, 2011

Best Computers and Peripherals  
32134 North 33rd Avenue  
Tulsa, Oklahoma 74102

Gentlemen:

This letter is in reference to an Epson NX515 printer that I purchased online from your company on August 5, 2011. When the order arrived, the box contained an Epson NX415 printer.

While both printers are all-in-one printers, the NX515 has wireless networking capability, while the NX415 does not. There is also a price difference of \$45.

I am enclosing a copy of my original online order for your reference.

I would like to return the Epson NX415 and exchange it for the Epson NX515 that I originally ordered. I would like for Best Computers and Peripherals to either send me a prepaid return authorization shipping label or reimburse me for the return shipping cost.

Earlier today, I checked your Web site which said the Epson NX515 is out-of-stock. The Web site did not say this last week when I placed my order. If you are unable to ship an Epson NX515, then I will keep the NX415, but I would like you to credit my credit card for the price difference of \$45.

Sincerely yours,

*Leon Williams*

Leon Williams  
(918) 555-6666  
[Lwilliams123@videologies.com](mailto:Lwilliams123@videologies.com)

## COVER LETTERS

**Cover letters** are often sent along with a résumé to emphasize what you can contribute to the hiring organization. When writing a cover letter, consider the following tips (Figure 3.24):

- Customize the letter for each job.
- Don't use a generic cover letter for every job application.
- Highlight your skills in bold font that match the job description.
- Make sure the cover letter does not contain any typos or grammatical mistakes.
- List specific examples of things you've accomplished and how each corresponds to the job description.
- Market your strengths, achievements, work ethic, and personality traits that will benefit the organization.
- Ask for an opportunity to interview.

Cover letters are typically written to:

- Respond to an advertisement for employment.
- Respond to a request for your résumé.
- Network with contacts during a job search.
- Accompany a proposal, report, or application.
- Respond to a job offer.

## DIRECTIVES

**Directives** are memos or emails that give instructions for a task, project, assignment, or new procedure. Directives address a particular problem and indicate a solution.

When writing directives, consider the following tips (Figure 3.25):

- State the reason for the directive, including a legislative compliance requirement, if any.
- Include specific instructions on what the reader is expected to do.
- State deadlines for the task or project.
- List any benefits that will be achieved from following the instructions detailed in the directive.
- Include the names and contact information for any resources who can answer questions or assist employees in implementing the directive.
- Thank the reader, and express confidence that the task or project can be completed.

Directives are typically written to:

- Establish new policies or procedures.
- Notify employees of a change in policy or procedure.
- Announce a special project.
- Issue instructions regarding a specific task or project.
- Delegate responsibility.
- Adjust territories or organizational structure.

**Figure 3.25** Directive**ANNOUNCEMENT**

To: All Employees

Effective January 1, 2012, new guidelines will go into effect for the use of contractors and consultants.

A written contract must be executed with all contractors and consultants and must include the following:

- A definition of the services to be performed;
- The fees to be charged to the company or the method of charging the company for the services; and
- The length of time the services will be provided.

These guidelines apply to any contractor or consultant currently performing services and to those that may be retained in the future. I have approved contracts that I can share and will be glad to customize them for specific circumstances you may have.

Please send me a copy of your signed contracts with contractors and consultants, so that I can maintain the agreements in a central location and track contract expiration and compliance.

Finally, these new guidelines establish the dollar limits for approval. For contracts for fewer than 90 days and less than \$25,000, a director may approve the contract. For contracts for more than 90 days or more than \$25,000, a vice president must approve the contract. Please ensure that the appropriate approval is obtained prior to engaging a contractor or consultant.

Thank you for your attention to these guidelines. If you have any questions, please let me know.

Edward Gibson  
Vice President

- Email messages may include hyperlinks to World Wide Web addresses.
  - Use the entire address, including the Internet protocol.

---

**Example:** <http://www.videologies.com>

---

- Use the active rather than passive voice in your messages.

---

**Example of passive:** Documents were drafted by the committee.

---

**Example of active:** The committee drafted documents.

---

- Avoid sexist language.

---

**Example:** salesperson instead of salesman

---

- If you make a request in your message, say “please.”
- Avoid all capital letters in your messages unless it is a warning like “DANGER.”
- When replying to an email, send a copy of the previous message or use a few lines as a quote.
  - For selective quoting, mark the previous message by using two << (less than) and two >> (greater than) symbols on each side of the quote.
  - Type your message below the quote or copy.
- Like a business letter, include a formal signoff.
- Include a signature (which can be stored as a signature file) with your messages.
  - Include your name, company, email address, phone number, and Web site.
  - Do not include pictures in your signature.
- Always read and spell-check your messages before you send them.



The following are examples of when email is an inappropriate medium for communication:

- Thank-you notes
- Long memos
- Yes-or-no answers (use the phone instead)
- Job praise (offer it in person or in a letter)
- Telling your boss you are sick (on the phone instead)
- Requests for raises, promotions, or resignations (meet in person or write a letter)
- Jokes
- Flirting
- Gossip

## ENDORSEMENT LETTER

An **endorsement letter** is used to endorse a candidate for an award, to endorse a political candidate, or to endorse a person for a particular position. When writing an endorsement letter, consider the following tips (Figure 3.26):

- Include your name and organization and your relationship with the person being endorsed.
- Describe what you are endorsing and why.
  - Explain why the person is entitled to your endorsement.
  - List how long you've known the person.
  - List the person's qualities.
- Explain what this person will do in the future, given his or her skills and qualities.
- Include your contact information if the reader needs additional information.
- Conclude by restating your endorsement.

**Figure 3.26** (continued)

I have known Darlene both personally and professionally for over 12 years. She has worked for my company on numerous occasions as a professional on-camera presenter. She is one of the best in her field.

Over the years, I have become friends with Darlene and have discussed her past and present religious beliefs. Darlene grew up in Asheville, North Carolina, on a small farm where her parents still live. Her parents are active in the church and taught Darlene to pray, have faith, and be kind to others. I see the result today as someone who “shines.”

While Darlene considers herself a Christian, she is accepting of other ideas and beliefs. She knows there is more to life than just following the dance steps to salvation. This was demonstrated recently, when she was counseling a woman at her church regarding the death of a loved one. The woman was afraid her dead husband wasn’t going to heaven because he might have violated some of the belief system rules for obtaining salvation. Darlene told this woman something that summarizes why Darlene shines. She said, “People sometimes tend to underestimate the size of God’s love.”

If we jump into the future and listen to Darlene a few years from now after graduating from the Candler School of Theology, I’m sure I’ll hear something just as comforting. Darlene’s unique experience as an on-camera presenter, public speaker, and trainer, combined with the insights and knowledge acquired from this educational experience, should result in someone who not only communicates, but also counsels, heals, and inspires.

I’m excited that Darlene has chosen this path and has chosen to further her knowledge and spiritual growth by applying to Emory University. It is something to celebrate, a chance to see destiny fulfilled.

Sincerely,

*Laura Johnson*

Laura Johnson

## FORMS

**Business forms** are created for common fill-in-the-blank documents such as job applications, health benefit claims, and legal documentation.

For legal documents, write numbers in words and then repeat them immediately in numerals inside parentheses.

---

**Example:** ten thousand five hundred and seventy-five (10,575)

---

For dates in legal forms, the month is always spelled out.

The following words and phrases often used in legal documents (Figure 3.27) are customarily written in full capitals, usually followed by a comma, a colon, or no punctuation:

- THIS AGREEMENT, made this second day of . . .
- KNOW ALL MEN BY THESE PRESENT, that . . .
- IN WITNESS WHEREOF, I have this day . . .
- MEMORANDUM OF AGREEMENT made this twenty-fifth day of . . .

Case titles in legal documents are always underscored, followed by a comma, the volume and page numbers, and date.

---

**Example:** Johnson v. Smith, 201 Okla. 433, 32 Am. Rep. 168 (1901).

---

Notary public forms are used to acknowledge and witness document signatures (Figures 3.28–3.30).

**Figure 3.29** Notary Form for a Corporation

**For a corporation**  
 State of \_\_\_\_\_  
 County of \_\_\_\_\_  
 On the \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, before me personally appeared \_\_\_\_\_ to me known, who, being by me duly sworn, did depose and say that he (or she) resides at \_\_\_\_\_; that he (or she) is \_\_\_\_\_(title) of \_\_\_\_\_(Company), the corporation described in and which executed the foregoing instrument; that he (or she) knows the seal of said corporation; that the seal affixed to said instrument is such corporate seal; that it was so affixed by order of the (title) of said corporation; and that he (or she) signed his (or her) name thereto by like order.

(S) \_\_\_\_\_  
 Notary Public

[Seal]

**Figure 3.30** Notary Form for a Partnership

**For a partnership**  
 State of \_\_\_\_\_  
 County of \_\_\_\_\_  
 On the \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, before me personally appeared \_\_\_\_\_ to me known, and known to me to be a member of \_\_\_\_\_ (name of partnership), and the person described in and who executed the foregoing instrument in the firm name of \_\_\_\_\_, and he (or she) duly acknowledged to me that he (or she) executed the same as and for the act and deed of said firm of \_\_\_\_\_ (repeat name of partnership).

(S) \_\_\_\_\_  
 Notary Public

[Seal]

## FUND-RAISING LETTER

**Fund-raising letters** are written by nonprofit organizations, schools, civic organizations, and clubs to raise money from donors. When writing a fund-raising letter, consider the following tips (Figure 3.31):

- Use a personal and conversational tone.
- Introduce yourself and the organization, and thank readers for their support and interest in the organization.
- Describe the cause and credentials of the organization.
  - Explain the critical need, what the organization has accomplished in the past, and how the requested funds would be used.
- Ask for a specific donation amount and explain how that donation will help the organization.
  - Explain how donations of this amount have helped the organization in the past.
  - Specifically mention any previous donations from the person.
- Optionally, offer an incentive for a donation such as a tangible gift or a perceived value.

---

**Example:** Imagine the impact your donation of \$100 will have on the lives of ten children in rural India.

---

- Optionally, include a separate page or a brochure with detailed information about the program and fund-raising campaign.
  - Include photographs statistics, and the budget.
- Thank readers for their generosity.
- Conclude the letter by leaving a positive feeling about the needy cause.
- The letter should be personally signed by someone from the organization.

Fund-raising letters are typically to:

- Request a donation.
- Invite someone to attend a fund-raising event.

**Figure 3.31** (continued)

The value of including art and music education is extremely important in helping our children develop their cultural talents. As a community, we would be remiss to disregard this need and allow budget cuts to reduce the quality of the education our children receive.

I hope you'll join me and the rest of the PTA members in making this first step toward a successful 2012 at Hopewell Middle School.

Sincerely yours,

*Carol Masters*

Carol Masters  
PTA President

## GRANT PROPOSALS

A **grant proposal** should include the following elements (Figure 3.32):

- Cover letter
  - An introduction to the organization requesting the grant
  - A summary of the proposal
  - A summary of any previous communications with the funding organization
  - The amount of funding you are requesting
  - The population that will be served by the grant
  - The need the project will help solve
- Cover page
  - Grant proposal title
  - Submitted to: (funding organization's name)
  - Date
  - Your contact information including name, title, organization, address, phone, and email
- Proposal report

- The content and format, varying depending on the requirements of the funding organization

A basic grant proposal should include the following sections:

- Project abstract or summary—a concise summary of the project that is no longer than one page. Write this section of the proposal last.
  - Need for the project
  - Population served
  - Brief description of the project
  - Goals and objectives of the project
  - Applicant’s history
  - How the program will be evaluated
- Statement of need
  - Description of the problem
  - Description of the population
  - Description of how the project will help solve the problem
- Goals and objectives
- Program description
  - Explanation of the program
  - Details on how the program will be implemented
  - Explanation of what will be accomplished
  - Timeline, the schedule for project implementation
- Evaluation—information on how the success of the project will be measured
- Organization and staff information
  - Description of the organization’s experience
  - Staff qualifications
- Budget—a summary of the expenses for the project
- Appendix
  - Research support
  - Nonprofit tax status letter
  - Annual report

*(text continues on page 496)*

ARR plans to launch 59 MHCs in the next three years, and 150 before the end of 2013. Isha Foundation is seeking funding to help us sustain and expand our ongoing ARR effort. Each MHC costs approximately \$29,000 to purchase and equip. The yearly operating expenses for one MHC are approximately \$17,000.

Isha Foundation is a nonreligious, nonpolitical, nonsectarian organization with over 250,000 active volunteers worldwide. Isha Foundation has over 150 centers in India and other parts of the world including the United States, Canada, Lebanon, Cyprus, France, and Germany. Based in Coimbatore, India, the foundation manages 87 centers in Tamil Nadu alone.

Over the past 14 years, Isha Foundation has successfully carried out several social outreach programs for rural people, as well as disadvantaged and often neglected segments of society, throughout Tamil Nadu, thereby gaining a reputable and trustworthy standing among the people throughout India.

Sincerely,  
Your Name  
Contact Information

(Courtesy of Isha Foundation)

## **ACTION FOR RURAL REJUVENATION**

Submitted to: XYZ Foundation

October 10, 2011

Name  
Isha Foundation  
Address  
Phone  
Email

(continues)



**Figure 3.32** (continued)**I. Summary**

The Isha Foundation's Action for Rural Rejuvenation (ARR) initiative is a multi-pronged, multi-phased, holistic, outreach program whose primary objective is to improve the overall health and quality of life of the rural poor of India. ARR is a unique, well-defined philanthropic effort, which enhances existing development schemes by supporting indigenous models of health, prevention and community participatory governance, while offering primary health care services and allopathic treatment through its dedicated team of qualified and trained personnel.

At present, nearly 750,000 people in rural Tamil Nadu, India are served by Isha's ARR project. ARR features Mobile Health Clinics (MHC), which are able to traverse hard-to-reach regions and effectively operate in resource-poor environments.

In addition to medical services for existing conditions, the staff on the MHCs offers preventive health care services in the form of yoga classes and provides sporting equipment to encourage physical activity.

**II. Statement of Need**

Currently, ARR operates nine MHCs and provides services to 143,000 patients in 280 villages each year. Of these patients, 67,000 are elderly people, 87,000 are women, and 21,000 are children. Over 50% of the MHC patients suffer from chronic ailments such as ulcers, musculoskeletal disorders, hypertension, depression, and respiratory disorders including asthma.

On average, each new MHC that is deployed can provide services for over 17,000 patients each year. Because rural children with conjunctivitis often scratch their eyes resulting in blindness, each MHC can provide timely medical services to over 2600 children each year.

**III. Goals and Objectives**

This project was launched in August 2003, under the aegis of Isha Foundation. The project aims to benefit 70 million rural people in 54,000 villages in Tamil Nadu, South India. It will be implemented in two phases over a period of 15 years. Thereafter, it is envisaged that local communities will sustain the project activities independently.

**Figure 3.32** *(continued)*

Each MHC includes a qualified allopathic physician, a trained nurse, two trained assistants and a pharmacist. The physicians are additionally trained in indigenous systems of healing. Prior to fieldwork, the MHC staff undergoes an intense training process including an orientation to working in resource-poor environments and guidance on how to effectively reach out and build rapport with the community in which they work.

In order to allow for maximal utilization of MHCs, standardized protocols have been implemented, including procedures for setup, data entry, and designations of roles and responsibilities of the staff. Apart from providing medical services, the MHC staff integrates with the local community. They share meals and reside in the homes of local villagers. Through these personal interactions, the MHC staff is better equipped to understand the needs and requirements of the local community. Furthermore, through these intimate interactions, they are able to ensure reciprocal dialogue with the community, mobilize support and by their example, inspire villagers to take responsibility for community health and well-being.

**V. Timeline**

Upon the funding of this grant request, a mobile health clinic can be purchased and equipped within three weeks. It can be on the road serving villages within one month.

Initially, a maximum of two villages are serviced daily by one MHC in order to assure adequate introductory and screening measures. Subsequently, a routine schedule is adopted during which each MHC typically services 4-5 villages daily, repeating these visits to each village on a fortnightly basis. Typically, one MHC serves 60-75 villages twice a month. Each clinic is in operation 24 days a month.

**VI. Evaluation**

The staff on each MHC maintains patient records, so the outcome of the project is easily measured in terms of number of patients served, the types of medical conditions treated, as well as demographic breakdown by age and sex.

For each MHC deployed, our target is to service 20,000 patients each year with a service area of approximately 60 rural villages.

**VII. Organizational Capacity**

Established in 1992, Isha Foundation is an international public service organization, founded by Jaggi Vasudev, dedicated to the enhancement of physical, mental and inner well-being of all people. Isha seeks to bring peace, inner balance and joy through the science of yoga and to relieve human suffering through a variety of initiatives on the individual, community and international level. Isha Foundation is a non-religious, non-political, non-sectarian organization with over 250,000 active volunteers worldwide.

Isha Foundation has over 150 centers in India and other parts of the world including the United States, Canada, Lebanon, Cyprus, France, and Germany. Based in Coimbatore, India, the foundation manages 87 centers in Tamil Nadu alone.

Isha is a predominantly volunteer-run organization. People who have been in some way touched and inspired by Isha Foundation comprise the volunteer base. Coming from all walks of life and all parts of the world, their quality of being dedicated, disciplined, and wanting to reach out is what is common across the organization.

Over the past 14 years, Isha Foundation has successfully carried out several social outreach programs for rural people, as well as disadvantaged and often neglected segments of society, throughout Tamil Nadu, thereby gaining a reputable and trustworthy standing among the people throughout India.

In addition to the selfless dedication of its volunteers, ARR is fueled and supported through its extensive partnerships with renowned national and international organizations, medical centers, and administrative centers, such as the Times Foundation, the Ramakrishna Hospitals, the Masonic Medical Center, the Kovai Medical Center Hospital, the KG Hospitals, the ELGI Group of Companies, and Shambhavi Trust, just to name a few. As part of their commitment to Action for Rural Rejuvenation, these organizations have pledged free and subsidized medical treatment to patients referred by the project, sponsored the design, construction or provision of the mobile health clinics and offered assistance of their own medical teams to go on rotation on the MHCs, among many other pledges.

*(continues)*

- Tasks involved in the procedure should be broken down into individual steps.
- Instruction steps should be numbered.
  - Substeps can be indented and alphabetized if they have to be performed in order.
  - If substeps can be performed in any order, bullets can be used.
- Supplementary information can provide commentary on what the process should look like at specific points in the instructions.
- Use the active voice for instructions.

---

**Incorrect:** The ENTER key should be pressed.

**Correct:** Press the ENTER key.

---

- Drawings, photographs, or screen captures are useful as roadmap illustrations.
- Major divisions of tasks can be grouped together under a heading.

**Figure 3.33.** Instructions

### HOW TO ACCESS THE PRECLASS WEBINAR

#### Getting Started

Before attending the Technical Analysis class, you will need to sign in to the learning management system (LMS) and view a preclass webinar.

To access the LMS and view the webinar, you will need:

- The course password (tech123)
- Your employee identification number
- The Web address for the LMS: <http://www.lms.com>

You will need approximately one hour to view the webinar.

(continues)

**Figure 3.33.** (continued)**How to Find Your Employee ID**

You will need your employee ID to sign in to the LMS. If you don't know your employee ID, follow these steps:

1. Open Internet Explorer and enter the following Web address:  
<http://www.tech.com>
2. Click the **Sign In** link in the top right corner.
3. On the Sign In page, change the Validation source to **Employee ID**.
4. New hyperlinks will be displayed. Click the link for **Forgot User ID**.
5. Answer the personal questions on the Verify Identity screen to get your employee ID.

**Viewing the Preclass Webinar**

Follow these steps to sign into the LMS and view the preclass Webinar:

1. Open Internet Explorer and enter the address for the LMS: <http://www.lms.com>
2. In the Quick Links section on the left side of the screen, click **Search Courses**.
3. On the Search Courses screen, select **Online Courses**; then click the **Go** button.
4. From the list of courses, select **TECH900**, and then click the **Select** button.
5. On the Sign On page, enter your employee ID and your last name as the password.
6. Click the **OK** button.
7. The preclass webinar will be displayed.

Warning: If you have a pop-up blocker running, the Webinar will not be displayed. To check, click the Internet Explorer **Tools** menu, then **Pop-Up Blocker**, and then check the setting. Make sure it is turned off.

## INTRODUCTIONS

An **introduction** is usually the first section in a formal report. The introduction introduces the report to the reader.

The introduction explains what the report is about, why it was written, for whom it was written, and what it will cover. An introduction is usually no more than one or two pages (Figure 3.34).

**Figure 3.34** (continued)

Chapter 5 examines the concept of labor force flexibility in terms of schedules, work arrangements, and other factors.

Chapter 6 highlights the dimensions of opportunity in the American workforce, including dynamic age, gender, race, and ethnicity perspectives.

The end notes provide important technical details, caveats, and references to additional information about the data items discussed in the main text.

Most of the tables and charts in *America's Dynamic Workforce: 2006* reflect annual average data for calendar years ending in 2005 as the most recent full year available. In some cases, monthly data through the latest available month in 2006 (typically June) are also referenced.

In this report, the terms "population" and "labor force" refer to the civilian non-institutional population ages 16 and older and to the civilian labor force age 16 and over unless specified otherwise. Similarly, data on workers refer to employed persons age 16 and over unless otherwise noted. Monthly or quarterly labor market data are seasonally adjusted unless specified otherwise.

Much of the data in this report were compiled from the public access files of the Bureau of Labor Statistics' Web site at [www.bls.gov](http://www.bls.gov).

(Courtesy of the U.S. Department of Labor)

## INQUIRY LETTER

**Inquiry letters** are written to ask for information or to make a request. Don't send an inquiry letter for information you could easily obtain on the Internet or on the telephone. Allow two weeks after sending an inquiry letter and not getting a response before sending a follow-up letter.

When writing an inquiry letter, consider the following tips (Figure 3.35):

- Use a courteous tone because you are requesting the reader's time to fulfill your request.
- Begin the letter by stating who you are and how you found out about the reader's organization.
- State what you are requesting as clearly as possible.
- Explain the purpose of your request and how it will help you.
  - Mention your qualifications, if doing so is appropriate.
- The letter should be short but should adequately explain what you are requesting and what action you want the reader to take.
- Offer to pay for any copies or supplies that might be needed to fulfill your request.
  - Provide a self-addressed stamped envelope if you have requested documents.
- Include the date you need the information.
- When the person responds to your inquiry, send a thank-you note.

Inquiry letters are typically written to:

- Request technical assistance.
- Request a reprinted article or publication.
- Seek personal advice.
- Request information about a product or service.
- Request an official document.
- Request a reply to a survey.
- Request an application.
- Request an estimate or bid.
- Request information about a job seeker.
- Request information from a government agency.
- Request samples or information.

## JOB DESCRIPTIONS

**Job descriptions** are often used when advertising an open position or when determining compensation.

A job description focuses on the job responsibilities, tasks, key qualifications, and basic skills needed to perform the job (Figure 3.36).

The categories that make up a typical job description include:

- Job title
- Department and to whom the person directly reports
- List of responsibilities
- List of other job titles and departments that the person will work with on a regular basis
- Terms of employment
- The necessary skills and experience required, including length of previous experience, educational requirements, and certifications

For existing positions, focus on the future needs and objectives of the business rather than on the current responsibilities of the position.

Be specific when describing tasks and responsibilities.

Any references to race, color, religion, age, sex, national origin, nationality, or physical or mental disability are illegal.



**Figure 3.36** Job Description**Title of the position**

Training Project Manager

**Department**

Human Resources

**Reports to**

Manager of Learning Technology

**Overall responsibility**

Provides project management and training development services for learning management system implementations and upgrades

**Key areas of responsibility**

- Provide project management services for e-learning course development.
- Provide training services for LMS administrators at subsidiaries.
- Develop training for LMS administrators and users.
- Provide support services for LMS users.
- Produce distance learning Webinars for Benefits and PeopleSoft instruction.
- Provide support to subsidiaries for e-learning implementations on the LMS.
- Manage the LMS administrator.
- Process training requests and assignments.

**Consults with**

- Human Resources Development department
- Training departments at subsidiaries

**Term of employment**

Full-time, on-sight, hours 8:00 A.M to 5:00 P.M.

**Qualifications**

- At least two years of project management experience for software implementations
- Experience working with learning management systems
- Experience conducting instructor-led training sessions
- Experience writing workbooks and job aids
- Experience supporting end users in a help desk function

**Figure 3.37** Job Offer Letter

January 20, 2012

Communication Enterprises  
3211 West Peachtree Street  
Dunwoody, GA 32311

Aileen Robertson  
2422 Churchill Lane, Apt 233  
Roswell, GA 30322

Dear Ms. Robertson:

It is my pleasure to present our offer of employment as training developer, reporting to me, Ken Wallace, Learning Technology Manager.

As training developer, you will be creating course manuals, PowerPoint presentations, and Help systems as a part of your normal job. In addition, you may also be asked to serve as an instructor from time to time.

Your annualized base salary will be \$62,000, payable on a semimonthly basis. You will also be eligible for an annual incentive, which will range from 0% to 4% of base salary paid, with a target of 3% of base salary paid.

Communication Enterprises offers the following competitive benefits, all of which are subject to the terms of the company or benefit plan guidelines. All of these benefits are covered in detail in the enclosed documents. You will be eligible to participate in the company health plan upon hire and in the company pension plan upon hire or at age 21, whichever is later. Based on your projected hire date of February 1, 2012, you will be eligible to participate in the 401(k) plan on July 1, 2012. Additionally, you will have up to two weeks of paid vacation, nine company paid holidays, and two personal floating holidays.

Aileen, you bring a background of experience and capability that should greatly enhance our efforts in the training department. We look forward to the beginning of a long and mutually rewarding relationship.

Sincerely,

*Ken Wallace*

Ken Wallace  
Learning Technology Manager

## MEETING AGENDA

A **meeting agenda** is a road map for a meeting. The agenda provides the plan for the meeting and a sense of direction and purpose.

A meeting agenda should include (Figure 3.38):

- Meeting starting and ending times
- Meeting location
- Topic headings with topic details
- How much time each topic discussion is expected to last
- Which meeting participants will facilitate the topics

**Figure 3.38** Meeting Agenda

<b>Meeting Called By:</b>	<b>Session #:</b>	<b>Date:</b>	<b>Starting Time:</b>
Mark Rivers		1/28/2011	9:30 a.m.
<b>Location:</b>	<b>Dress Code (optional):</b>		<b>Ending Time:</b>
Central Park Conference Room 11a			12:00 p.m.
<b>Meeting Objective and Scope:</b>			
JAD Session—The Big Picture.			
<b>Time</b>	<b>Topic</b>	<b>Leader</b>	
9:30–9:35	Welcome and review agenda.	Mark Rivers	
9:35–9:55	Basic data flow for enrollments.	Ritva Porter	
9:55–10:15	Ongoing data requirements	Ritva Porter	
10:15–10:35	Basic data flow for pay processing	Ritva Porter	
10:35–10:45	Break		
10:45–11:10	Basic data flow for 401(k) billing.	Ritva Porter	
11:10–11:30	Basic data flow for termination processing.	Ritva Porter	
11:30–11:50	Basic data flow for loans.	Ritva Porter	
11:50–12:00	Wrapup	Mark Rivers	
<b>Facilitator:</b>	<b>Time Keeper:</b>	<b>Scribe</b>	
Ritva Porter		Debra Miller	
<b>Attendees:</b>			
Anne Fried, Mark Rivers, Donna Morgan, Tonya Smith, Debra Miller, Sally Roberts, Susan Mullins, Ebony Hollings, Tanya Sanchez, Mary McKnight, Daphne Johnson, Mike Harper, Kevin Wilson, Kendall Williams, Rita Zezula, Darlene Price			

At corporate meetings the following actions will normally be approved by the board of directors:

- Election of officers of the corporation
- New business policies and plans
- Creation of committees and assignments
- Issuing and selling stock
- Approval of the sale, transfer, lease, or exchange of any corporate property or assets
- Approval of mergers and reorganizations
- Adoption of a pension, profit-sharing, or other employee benefit plans and stock option plans
- Approval of corporate borrowing and loans
- Entry into joint ventures
- Designation of corporate bank accounts and authorized signatures
- Changing an officer's compensation
- Entry into major contractual agreements

### **Corporate Resolutions**

Formal resolutions may be made in one of these forms:

- WHEREAS it is necessary to . . . ; and
- WHEREAS conditions are such that . . . ; and
- Therefore be it
- RESOLVED, That . . . ; and be it
- RESOLVED further, That . . .

Note that the word *whereas* is in caps with no comma following it; the first word after it is not capitalized unless it is a proper name.

The word *resolved* is also set in caps but is followed by a comma and a capital letter.

**Figure 3.39** Meeting Minutes

**Minutes of Meeting of  
the Historical Society of the University of Texas  
Hotel Driscoll, Austin, Texas  
May 1, 2012**

At the meeting of the Historical Society of the University of Texas at Austin, some 100 charter members being present, the Society was called to order at 1:05 p.m. by Mr. John R. Combs, chairperson, who requested Mr. Warren T. Scaggs to serve as temporary secretary.

Mr. Combs dispensed with the reading of the minutes of the last meeting because a copy had been previously distributed to all members.

A communication from the National Historical Society, read and accepted by the Society, dealt with the planting of redbud trees throughout America.

A communication from Miss Harriet Allen of New York City asked that the Society refrain from its normal pattern of conducting spring tours throughout the State of Texas. Several members, after the reading, expressed disagreement with the views given by Miss Allen.

There was no unfinished business.

New business was the election of officers for the remaining current year. The following nominations were announced by Mr. Warren T. Scaggs, chairperson of the Nominating Committee:

President	Mrs. Rutherford Tinsdale
Secretary	Mr. Joseph Mapes
Treasurer	Mrs. Theodore R. Tollivar
Members of the Council	Ms. Louise Allen
	Mrs. Philip W. Crossman
	Mr. John Stobaugh
	Mrs. John C. McCann

**Figure 3.40** Memo

TO:	Mary Anne Scott, Shipping Department Manager
FROM:	Bob Brueck, President
DATE:	May 12, 2011
SUBJECT:	Meeting to discuss various overseas carriers

A meeting has been scheduled for Tuesday, May 12, in my office to discuss with several carrier representatives suggested methods and costs to deliver our products to international markets. Your attendance is requested.

Distribution:  
Tom Alberton  
Martha Reeves

## MISSION STATEMENTS

A **mission statement** explains an organization's purpose, function, and reason for existing. A mission statement motivates employees, customers, and stockholders.

A mission statement guides decision making throughout the organization. Mission statements are often included in annual reports, company brochures, and Web sites, and they may also be printed and framed.

When writing a mission statement, consider the following tips (Figure 3.41):

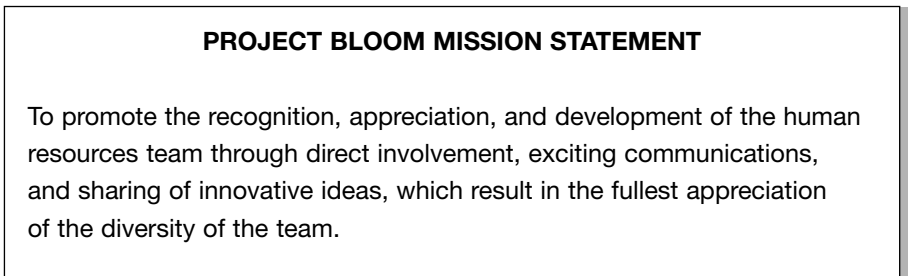
- Include a statement of purpose.
- Include a description of the organization's business or principal activities.
- Include acknowledgment of all stakeholders.
- Optionally include the organization's goals and how they can be measured.

- Optionally include the organization's values and establish a sense of identity.

When brainstorming and writing a mission statement, ask and answer the following questions:

- Why was the organization created?
- Who are the stakeholders?
- What services does the organization provide?
- What identity do you want to project for the organization's products or services?
- What do you want to communicate to the community?
- What does the future look like for the organization?
- What organizational values are needed to achieve?

**Figure 3.41** Mission Statement



## NEWSLETTERS

Corporate **newsletters** are written to publicize news about a company or department for reading by employees or customers. Newsletters can be distributed on paper, sent via email, or posted on a Web site (Figure 3.42).

Regardless of whether they are paper or electronic, corporate newsletters usually involve a front page, inside articles, and announcements on the back page.

- Front page news focuses on achievements, success stories, or changes that affect the audience.

## Newsletter Articles

Consider the following guidelines when writing a newsletter article (Figure 3.43):

- Develop a title for the article that will accurately convey the topic or theme.
- Use a title that arouses curiosity.
- Use photographs that illustrate the story.
- Optionally, write an opening story summary that can be set apart in bold and included at the beginning of the article or in a sidebar.
- The lead sentence should introduce the topic, engage the reader, and focus on the reader's point of view.
- The body of the article should include relevant background and history, explain the implications of the topic, provide specific examples, and make suggestions.
  - Use transitions to connect the main points of the article.
- The article's conclusion should repeat the most important point and emphasize why it is important to the readers.
- Use appropriate language for the audience.
  - Avoid using jargon and clichés.
  - Avoid complicated sentence constructions and wordiness.
  - Keep paragraphs short and focused.
  - Use quotes and testimonials when appropriate.

**Figure 3.43** Newsletter Article

### **WHAT DO YOU HAVE TO LOSE?**


Have you noticed something missing from the 11th floor? Like 91 pounds?

That's how much the participants of the "What Do You Have to Lose" challenge lost all together. We had three teams of five people, and the team that had the highest percentage of weight loss at the end of the challenge won. The challenge kicked off on July 10 and wrapped up on September 7. In addition to losing 91 pounds, some participants brought their blood pressure down to a healthier level, others started an exercise program, and some replaced their daily cokes and coffees with 64 ounces of water.

Congratulations to the winners, The Fabulous Five (Donna Gilbert, Ken Willingham, Sterling Mabry, Cathy Price, and Darlene Warren). Together they had a 21% weight loss. The winners each received a \$110 Visa Gift Card.



Figure 3.42 Newsletter



GSA Office of Citizen Services and Communications

Intergovernmental Solutions Newsletter

# Transparency and Open Government

Spring 2009

## Transparency in Government

By Darlene Meekell  
 Director, Intergovernmental Solutions  
 GSA Office of Citizen Services and Communications

**N**ewly elected President Barack Obama has taken bold steps to inaugurate an era of government openness and transparency. In one of his first official acts, the President issued a *Memorandum on Transparency and Open Government*, affirming his commitment to achieving an "unprecedented level of openness in government." Making known his belief that transparency is a fundamental responsibility of a democratic government, he called for the creation of an Open Government Directive that would require agencies to reveal their inner workings and make their data public.


A commitment to government accountability is at the heart of this message. By allowing citizens to "see through" its workings and investigate whether or not their leaders and organizations have met their expectations, the government brings the public into its inner circles and empowers citizens to contribute to decision-making. As citizens gain knowledge and understanding, their trust in government begins to grow.

Providing government data to citizens in a meaningful way will require a culture change, away from one where data are stored away for internal purposes to one that looks broadly at how data can be made accessible for re-use by the public. The federal website *Recovery.gov Reveals Details of the Stimulus Spending* on the \$787 billion American Recovery and Reinvestment Act. It will put the data out in useable form so that people can slice, dice and mash it up to gain meaningful information about how government is working.

These data feeds create opportunities to look at government programs in new ways that could never have been imagined by the data collectors. The District of Columbia's *Apps for Democracy* Contest drew upon the public's imagination to make D.C. data more useful to constituents. Under the leadership of then-CTO Vivek Kundra, the District sponsored a contest seeking creative applications that use D.C. government data. The results were astonishing. The 47 entries submitted to *Apps for Democracy* within only 30 days "produced more savings for the D.C. government than any other initiative," according to Kundra, who has since been named federal CIO.

Continued on next page...

The Intergovernmental Solutions Newsletter is produced twice a year by the Intergovernmental Solutions Division, GSA Office of Citizen Services and Communications; Lisa Nelson, Editor. Send comments and suggestions to: [lisa.nelson@gsa.gov](mailto:lisa.nelson@gsa.gov).



**Figure 3.44** Note**COBRA Overage**

A COBRA overage process was put in place to keep the benefits plan in compliance with IRS guidelines. When COBRA overage processing runs on Sunday and Wednesday night, it evaluates all employees' benefits and their covered dependents.

When a dependent reaches his or her 23rd birthday (without the disabled indicator checked), the system **automatically** drops the dependent from any medical and/or dental coverage.

**Note:** Home Office changes the disabled indicator in the database once an dependent is approved per plan guidelines.

*Tips* should be formatted like notes with the word *Tip* in bold and followed by a colon.

**Figure 3.45** Tip

With the exceptions of the employee's retirement or eligibility for long-term disability (LTD), domestic partners are not eligible for COBRA independently of the employee. Events where COBRA should not be offered to a domestic partner include termination of the domestic partner relationship and death of the employee. The domestic partner coverage is terminated due to the employee's retirement or eligibility for the LTD health care plan, at which time the domestic partner will be given the option to elect COBRA continuation for a period of 18 months.

**Tip:** If an employee terminates and has domestic partner coverage under domestic partner medical, dental, or vision, the COBRA forms generated do not include COBRA rates for the domestic partner. To ensure that the employee is offered COBRA for the domestic partner, write the domestic partner's name, Social Security Number and date of birth on the COBRA form in the "Eligible Participants" section.

*Warning* notices should be formatted with the word *Warning* written in italics with approximately a half-inch of tab space separating the word from the message.

- The text of the message should use the regular body font with no italics or bold.
- Skip one line before and after the warning.

**Figure 3.46** Warning Notice

The battery is one of the most important components on a vehicle today. It supplies not only the cranking amperage to start the engine, but also the initial voltage needed to run the onboard computer, ignition system, fuel injectors, lights, and all the vehicle accessories. Most of these systems require a minimum level of power to operate correctly. Having a good battery is absolutely essential for reliable vehicle starting and operation.

***Warning:*** Be careful when handling batteries due to corrosive battery acid that may leak from the battery and damage your skin or eyes. Always wear gloves and eye protection.

*Caution* notices are formatted with the word *Caution* in bold and followed by a colon.

- Caution should appear on a line by itself.
- Skip one line before and after the caution notice.
- The text for the message is single-spaced and is aligned with the word *Caution*.

**Figure 3.47** Caution Notice

*Multimedia* is commonly defined as combining multiple forms of media such as audio, graphics, text, and video. Together, we will explore the multimedia control panel on your computer and find out how you can customize the features to enhance classroom presentations.

**Caution:**

Although we feel that it is important to show you how to control your settings, we recommend that you not make any changes to the system at this time. This is a multimedia course. It could be affected by any changes you make.

## PERMISSION LETTER

A **permission letter** is written to grant authority to someone for a specific purpose. Approval letters and authorization letters are similar.

When writing a permission letter, consider the following tips (Figures 3.49–3.50):

- Begin the letter by stating what permission is being granted and to whom it is being given.
- State the reasons for granting permission.
- Indicate the next steps the person is authorized to take.
- State any dates when the permission is effective, date of a specific event, and date the permission will expire.
- Include any other specific information regarding use of the permission.
- Include any special stipulations or guidelines that are required.
  - Outline any responsibilities.

Permission letters are typically written to:

- Approve a request.
- Approve a vacation or leave of absence.
- Approve the use of facilities.
- Give permission to be photographed as a model.
- Approve the use of a company vehicle.
- Authorize the use of copyrighted material.
- Grant permission to attend a conference or training session.
- Authorize medical treatment.
- Authorize work on a project.
- Delegate authority.
- Delegate a special project.
- Authorize research.

*(text continues on page 524)*

**Figure 3.49** Permission Letter Granting Permission

**PHOTO IMAGE GRANT OF RIGHTS AND RELEASE**

In consideration of the opportunity to have my image published and other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the undersigned (“Releasor”) hereby grants XYZ Corporation, its affiliates and their permittees (collectively, “Releasees”) the following rights with respect to the use of the Releasor’s image in the photographs taken on August 25, 2012 described as follows: XYZ Training Photos.

1. To alter and edit Releasor’s image without limitation.
2. To use and publish Releasor’s image and, in conjunction with it, Releasor’s name and biographical information, in any medium, whether now or hereafter existing, including without limitation, any online service or Web site, and for any purpose, including, without limitation, promotional, advertising and marketing purposes.

With regard to these rights, Releasor releases and discharges Releasees and each of them from any and all claims and demands arising out of or in connection with the use of such photograph(s), the images therein (whether altered or unaltered) and Releasor’s name and biographical information, including, without limitation, any claim for defamation, misappropriation, right of publicity, false light, invasion of privacy and copyright infringement.

The Photo Image Grant of Rights and Release constitutes an Agreement between Releasor and XYZ Corporation and contains the entire understanding between the parties. It cannot be modified except by written agreement signed by both parties and shall be governed and construed in accordance with the laws of the State of Georgia.

\_\_\_\_\_  
By: Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name

\_\_\_\_\_  
Address

\_\_\_\_\_

## POLICIES, RULES, OR GUIDELINES

**Policies** are rules or guidelines for a specific business process. They are formal corporate-wide instructions that must be followed by everyone within the organization. Violation of policies may result in disciplinary action. New policies must be approved by corporate management. (Figure 3.51.)

**Rules** are less formal than policies and define acceptable behavior within a particular department or division.

- Rules may not impact the entire organization.
- New rules must be approved by department or division heads.
- Violation of rules may result in disciplinary action.

**Guidelines** suggest ways of handling certain situations.

- Violating a guideline does not necessarily involve sanctions.
- A subject matter expert should approve guidelines.

**Policies** address a particular problem or issue and specific groups of employees.

- Policies must be formally shared with the group of employees who will be governed by the language.
- Employee handbooks are often published with company policies and distributed to all employees.

To write a policy, rule, or guideline, follow these steps:

- Create an outline of the topics that could be covered by the policy, rule, or guideline.
- State the purpose of the policy, rule, or guideline.
- State clearly what the policy, rule, or guideline allows and doesn't allow.
- Explain to whom the policy, rule, or guideline applies.
- Provide any background information that provides context on why the policy, rule, or guideline is needed.

- List any legislation that governs the policy, rule, or guideline.
- Describe any specific procedure that must be followed.
  - Use short paragraphs or numbered steps.
  - Group tasks together under subheadings.
- Explain what to do if violations occur.
- Explain any terminology that may be confusing to a general audience of employees.
- List any special circumstances when the policy, rule, or guideline does not apply.
- List any time restraints if applicable, including the effective date.

**Figure 3.51** Policy

### **WHO IS ENTITLED TO BENEFITS UNDER COBRA**

There are three elements to qualifying for COBRA benefits. COBRA establishes specific criteria for plans, qualified beneficiaries, and qualifying events:

**Qualified Beneficiaries**—A qualified beneficiary generally is an individual covered by a group health plan on the day before a qualifying event who is either an employee, the employee’s spouse, or an employee’s dependent child. In certain cases, a retired employee, the retired employee’s spouse, and the retired employee’s dependent children may be qualified beneficiaries. In addition, any child born to or placed for adoption with a covered employee during the period of COBRA coverage is considered a qualified beneficiary. Agents, independent contractors, and directors who participate in the group health plan may also be qualified beneficiaries.

**Qualifying Events**—Qualifying events are certain events that would cause an individual to lose health coverage. The type of qualifying event will determine who the qualified beneficiaries are and the amount of time that the plan must offer the health coverage to them under COBRA.

*(continues)*

- Don't use too much text.
- Use contrasting colors, different text sizes, bold, or italics to set apart a particular element on the screen.
  - Highlight individual lines of text that are the focus of the slide.
- Bulleted text lines should be aligned to give the page an elegant look.
  - Keep all bullets on the same level grammatically parallel.
  - Indent text from the bullet symbols by a consistent space for all levels of bullets.
  - Avoid big paragraphs of text that fill the slide.
    - Use bullets, headings, and subheadings instead.
- Repeat visual elements and text throughout the presentation to focus on key points and to unify the presentation.
  - Repeat headings from slide to slide when appropriate.
  - Repeat text from slide to slide, while highlighting a different line on each slide.
- Group similar items on the slide to show a relationship.
  - Use subheadings with nested bullets for a list.
  - Use a graphic with associated text to show a visual connection to the text.
- Use sans serif fonts like Helvetica, Swiss, Arial, Avant Garde, and Modern.
  - Avoid mixing serif and sans serif fonts within the same presentation.
- Apply background shading for presentations that will be projected.
  - Use a white background for presentations that will be printed and distributed on paper.
  - If shading is used, use a gradient that gradually changes from light to dark or from one color to another to add visual depth to the presentation.
  - Apply a consistent color scheme to the entire presentation.
    - Do not use differently colored backgrounds for each slide in the presentation.



- Create styles for the entire presentation using Slide Master to:
  - Set the text placement as well as font size and color on all slides.
  - Keep the presentation consistent.
- Use Notes Master to insert speaker notes into the presentation.
  - When printed on paper, the slide appears at the top of the page and the notes appear at the bottom.
- Use Handout Master to add text and artwork to audience handouts.
- To save time when designing a presentation, use PowerPoint templates that are prebuilt and professionally designed.
  - Templates are available within the PowerPoint application.
  - Additional templates can be downloaded from the Internet.
- Use charts, photos, or illustrations that communicate visually.
  - Free clipart is available within PowerPoint.
  - Bar charts and pie charts can be created in PowerPoint.
    - Organizational charts can also be created within PowerPoint.
  - The Smart Art Graphics feature, available within the PowerPoint program, allows you to insert nice looking diagrams.
  - Digital cameras can be used to take photographs that can be imported into PowerPoint and placed on a slide.
  - AutoShapes allows you to create geometric shapes, arrows, and lines to help illustrate your slides.
- Videos, animation, and sound can be added to slides to create a multimedia presentation.

### Planning a Presentation

Consider the following guidelines as you plan your presentation.

- Determine your goal and objectives.

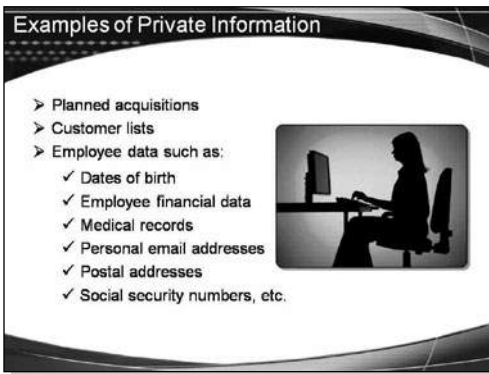
---

**Example:** Do you want to persuade or inform?

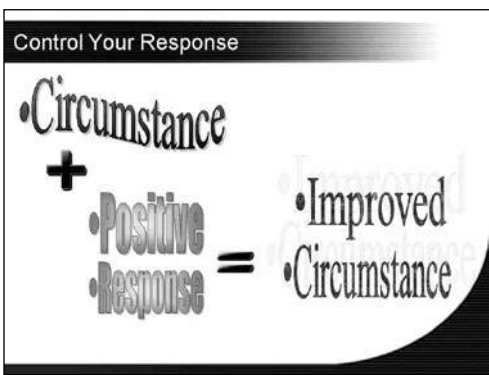
---

- Consider the environment for the presentation.
  - How visible is the screen from each part of the room?
  - If visibility is in question, include handouts with printed versions of each slide.
  - If you are not familiar with the equipment, arrange time for setting up and rehearsing your presentation before delivering the real thing.
- Practice delivering your presentation.
  - Deliver your presentation to a coworker or friend and ask for a critique.

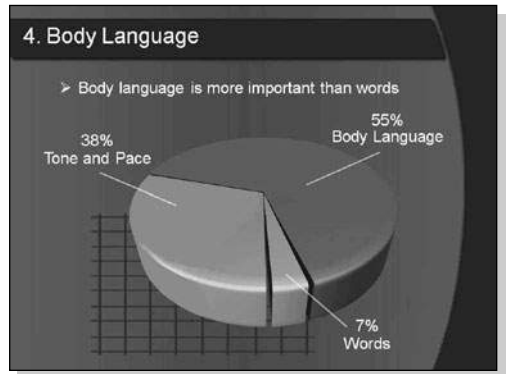
**Figure 3.52** Slide with Bulleted Lists, a Graphical Background, and Photo



**Figure 3.54** Slide with PowerPoint WordArt



**Figure 3.53** Slide with Title, Bulleted Subtitle, and Pie Chart



**Figure 3.55** Slide with Graphics Rather Than Text



## PRESS RELEASES

A **press release** is a written communication directed at the news media for the purpose of making an announcement. When writing a press release, consider the following guidelines (Figure 3.56):

- Lay out your document on an 8½ x 11-inch page.
- Provide wide margins and double-space the copy.
- Include a release date at the top of the page.
- Provide a contact name and address. Provide as much contact information as possible, including fax, email, and Web site addresses.
- Include the phrase “For Immediate Release” along with a contact name and phone number. If the release date is in the future, instead say, “For Release on [date].”
- Include a suggested headline.
- Start your first paragraph with the location in all caps, followed by the month and day.
- Summarize your story in the first paragraph, including who, what, why, where, when, and how.
- Make sure the first 10 words are effective; they are the most important.
- Elaborate on the details, including quotes from important sources.
- Make sure the information is newsworthy by suggesting other tie-ins. Pick an angle. Try to make your press release timely by tying it to current events or social issues.
- Avoid excessive use of adjectives and fancy language. Use only enough words to tell your story.
- Use the active, not passive, voice. Verbs in the active voice bring your press release to life.
- Avoid jargon specific to your organization that might not be recognized by other readers.
- Answer the question, why should anyone care?
- Use real-life examples, if possible, that include stories of the people involved.

Mark Giddings, vice president of print media operations at Bronson Media, commented, “The contract with Videologies is a big step forward for Bronson’s newspapers. It will allow us to standardize circulation and production systems, making cooperation between our print media holdings more efficient and effective.”

###

## PROCEDURES

**Procedures** are instructions that explain how to perform a particular task (Figure 3.57).

To write a procedure:

- State the goal of the procedure.

---

**Example:** This procedure tells you how to install a cable modem.

---

- The heading for the procedure may also state the goal.

---

**Example:** Installing a Cable Modem

---

- If specific supplies or knowledge are needed for the procedure, provide a list before detailing the steps.

---

**Example:** Before you start, you’ll need the following: coaxial cable, pliers, and a screwdriver.

---

- If a certain level of experience is necessary, provide a list for whom the procedures are intended.

---

**Example:** Before attempting this procedure, you should have a basic understanding of an operating system.

---

- When is it necessary to use specific terminology to describe the procedure, use only what is absolutely necessary.
  - Don't overload the procedure with unnecessary jargon.
  - Explain any specialized technical terms that are used.
- Provide an estimate of how long it will take to complete the procedure.
- List the steps in the procedure using numbered lists.
- Break the steps in the overall procedure into smaller sections.
  - Limit the number of steps to 10 in each section.
  - Each section should have its own title.
- If a particular step has substeps, indent a secondary list using letters to designate them.
- Describe only one step at a time.
  - Each step should describe one task.
- Include illustrations where appropriate.
- If certain conditions apply or if performing a step will cause something to happen, present this information at the beginning of the step.

---

**Example:** To shut down the computer, click the **Start** button, then click **Turn Off the Computer**.

---

- When someone else is supposed to perform a particular step in the procedure, describe who is responsible and what he or she will do.

---

**Example:** The licensing department will accept your serial number, and will email you an activation code.

---

- At the end of the procedure, include a statement that tells users that the procedure is complete and what the result is likely to be.

---

**Example:** That completes the steps for installing the cable modem. The power and Internet lights should be solid green.

---

- Provide references to other useful information.

## PROGRESS REPORTS

**Progress reports** are written to inform a supervisor about the status of a project. These reports detail what was completed for the previous period, what percentage of the work has been completed, and what is planned for the next period. Any problems or issues are listed in the report.

Progress reports let management know about the overall health of a project and its team members. Progress reports also let everyone on the team know how the overall project is going.

These reports range from simple memos for small projects, to informal letters, to formal reports.

- Memos are often used for internal progress reports.
- Progress report letters are sent to outside clients.
- Formal progress reports are also sent to outside clients.

All progress reports include (Figure 3.58):

- What work has been completed since the last report
- What work is currently being performed
- What work is planned
- Individual tasks, sometimes listed, along with their completion percentages
- The progress of different stages of development and categories for different departments (may be listed for large projects)

Project reports prepared for outside customers may also include:

- The project purpose
- Objectives
- Scope or limitations
- Start date and completion date
- Current development phase
- Team members

*(text continues on page 540)*

Figure 3.58 Progress Report

**ERP UPGRADE PROJECT STATUS REPORT****Name of Project:** ERP Upgrade**Date:** July 27, 2012**Project Manager:** Mary Dawson**Sponsor:** Allan Cummings**Project Objectives:**

Upgrade the existing ERP application to position Acme Industries to maintain vendor support for the application and to consider undertaking projects, after the upgrade, which will implement new functionality offered in the ERP system.

**Implementation Date:** August 20, 2012**Current Phase:** QA Testing/UAT Testing/Implementation Planning**Project Management Summary:**

The upgrade project remains on track. 14 business days until we began our upgrade implementation!

**ISSUE**

Integrated QA test environment was planned for May 7 and is not completely ready.

Update—Stellent configuration issue was resolved and testing for Stellent will start next week.

QA Testing—The formal QA testing period is over; however, QA testing will continue for some items, including:

- HR/benefits—75% complete. Outstanding are items associated with HCFA, MSY, Retirees, and FSA.
- eApps—95% complete. Outstanding are items associated with integration testing that we delayed/not operating in our integrated test environment.
- Security—90% complete. Outstanding items are 4 reports that have been on hold pending resolution to reporting problems in QA. Testing planned for next week is in development.

System testing and UAT have been combined for HRM, HRM Data Prep, Hyperion, and Stellent. Status for these will be reported under user acceptance testing.

*(continues)*

Development: Development team is on track with issues and defects. Retrofitting for public and private queries continues. Continued refinement of implementation plan. Planned dress rehearsal—Test Move 7. Completed some pre-implementation tasks in PROD—copied software, set up data files, and added temporary space for backups.

eRecruit: Continued QA testing and UAT testing. Received signoff from subsidiaries. Additional sessions are scheduled for next week.

Training, documentation, and communication tasks are on schedule.

**Deliverables completed last week:**

Task	Complete Date	Comments
Milestone: Completed eRecruit system testing	7/23	No problems.
Milestone: PDR UAT complete	7/23	Report format issues were resolved.
Milestone: Simple Steps UAT complete	7/23	No problems.
Milestone: Total Compensation UAT complete	7/26	Data sync issue was resolved.

**Deliverables scheduled for completion in next 2 weeks:**

Task	Due Date	Comments
Milestone: eRecruit Query Development Complete	8/9	Mark Lester is out for medical leave.
Milestone: eRecruit Technical Process Flow Complete	8/13	
Milestone: Coordination of Division Portal links and URL changes for eRecruit complete	8/20	Outside focus group members are needed.

(continues)



**Figure 3.58** (continued)

**Resource Changes:** None.

**Future Meetings:**

- Daily UAT testing sessions
- Daily Parallel testing sessions and morning meetings
- Full Team Status Meeting 7/31 \*\* Moved to Tuesday for this week only \*\*
- Weekly Training, Documentation, and Communications Team Meeting 7/30
- Weekly Implementation Meeting 8/1
- Weekly IT Leads Team Meeting 8/1
- Weekly HR/Benefits Analyst Team Meeting 8/1
- Weekly QA Team Meeting 8/2
- Weekly Payroll Analyst Team Meeting 8/2
- Weekly Developers Team Meeting 8/2

## PROPOSALS

**Proposals** usually consist of a bid and a description of a project, and they are sent to a customer. Many proposals are sent after a prospective customer makes a request for proposal (RFP).

There are several different types of proposals:

- Internal proposals written for someone within the same business
- External proposals written to another business or government agency
- Solicited proposals that are written and sent in response to and in accordance with the guidelines described in an RFP
- Unsolicited proposals that are sent to convince a potential customer to do business with you

Most proposals include the following sections (Figure 3.59):

- Cover letter—to be sent with a proposal
- Introduction—introducing the proposal, referring to previous contacts with the customer, and providing an overview of the contents of the proposal

**Figure 3.59** *(continued)***INTRODUCTION**

This proposal is for the production of an LPS training video for BSP Energy's SAR Department.

BSP Energy's request includes the following requirements:

- Limit video length to approximately 35 minutes
- Deliver the finished video by November 30, 2012
- Shoot at two sites in either New Jersey or Los Angeles basin area
- Create 10 minutes of material on drilling, monitor well installation, and sampling tasks
- Create 10 minutes of material on trenching, and SVE installation LPOs
- Create 6 minutes of material for supervisor feedback sessions
- Create 9 minutes of material featuring a host on camera for introductions and other commentary

After careful examination of these requirements, Videologies proposes the following:

- Research and scriptwriting with access to subject matter experts in the Atlanta area or via telephone or email
- Pre-production location visit by our producer
- Five days of production at two different locations in either New Jersey or Los Angeles
- One day of production in the Atlanta area for shooting an on-camera host
- Video still graphics to illustrate concepts
- Text and graphics
- Optional CD-ROM version
- Optional Streaming Video version for Web distribution

### **SPECIFICATIONS**

The LPS Training video produced for BSP Energy will include the following specifications:

- 35-minute video script
- Producer services to coordinate all aspects of the production
- Video production using XDCAM HD format
- Video production crew including a director, camera operator, and lighting assistants as appropriate
- Use of a professional actor or actress for on-camera and voice-over narration
- One pre-production trip to either New Jersey or Los Angeles to scout locations and coordinate activities
- One five-day trip to either New Jersey or Los Angeles for shooting segments A, B, and C as outlined in the LPS Training Video Work Scope provided by Andy Nowell of BSP Energy
- Nonlinear post production to edit a master tape for duplication
- Video graphics for illustrating concepts
- Titles and transitional effects
- Background music
- Two approval copies
- One Blu-Ray DVD master for duplication

BSP Energy will provide the following logistical and review requirements:

- Script review and approval
- Locations
- All necessary props
- Personnel for demonstrations and activities described in the script
- Subject matter experts
- Company logos

*(continues)*

## PRODUCTION

The production process will consist of the following stages:

- Content analysis and design
- Scriptwriting
- Video production
- Graphics production
- Post production
- Programming
- Study guide production
- Revisions
- Final mastering

### **Content Analysis and Design**

Videologies will meet with subject matter experts and review previously produced materials, such as LPO forms and LPS handbooks. We will work together to plan our work practice scenarios to feature specific LPO opportunities for students. After completing content analysis, Videologies will create a design document that summarizes our plans for the video.

### **Scriptwriting**

After a design is approved by BSP Energy, the scriptwriter will draft a script in a two-column format describing visuals and narration or suggested on-camera audio. This script will be submitted to BSP Energy for review. After this review, any revisions required will be made and a final script will be submitted for approval.

### **Video Production**

After the script is approved, video production will begin. Video production will consist of the following:

- Five days of production on location at two sites in either New Jersey or Los Angeles
- One day of production in Atlanta to shoot the on-camera host
- Narration recording

*(continues)*

**Figure 3.59** (continued)**Graphics Production**

Video graphics will be created to illustrate concepts where appropriate. Title screens will also be created and added where appropriate.

**Post Production**

During post production, we will edit the raw footage, mix the audio, add music, insert graphics, and incorporate transitional effects where appropriate.

**Study Guide Production**

A short 10–20 page study guide will be created to facilitate the learning experience for self-paced training.

**Final Mastering**

After final approval of the video, a Blu-Ray DVD master will be delivered for duplication purposes.

**OPTIONS**

BSP Energy has requested that Videologies provide quotes on future upgrades of the video to CD-ROM and possible Web site delivery. In addition, we can provide VHS duplications upon request.

**CD-ROM**

The content created for the LPS Training video and study guide can be upgraded for delivery via CD-ROM. Depending on the design and content requirements, we can create a wide variety of CD-ROM–based programs ranging from a simple AVI video player to a more complex system incorporating additional audio instruction, graphics, simulations, and test questions.

The finished video segments can be converted to a Windows AVI video format at a screen size of 320 × 240 and played on a IBM PC compatible equipped with a CD-ROM drive, soundcard and speakers or headphones. We would recommend a minimum configuration of Pentium II 350 with an 8X CD-ROM drive.

As the least expensive option, we can create a CD that includes an autorun feature so installation is not necessary. Upon inserting the CD, the user will see a 640 × 480 menu screen that gives students access to a downloadable study guide, downloadable LPO forms, and menu choices for viewing the various video sequences (or lessons).

Figure 3.59 (continued)

**LOGISTICS AND SCHEDULE**

Videologies proposes the following schedule for the video:

Begin project	August 8, 2012
Content research	August 8–17, 2012
Content design delivered	August 21, 2012
Design approval from BSP Energy	August 28, 2012
Scriptwriting and revisions	August 28–September 18, 2012
Script approval from BSP Energy	September 25, 2012
Location shoot in either New Jersey or Los Angeles	October 1–5, 2012
Host shoot in Atlanta	October 8, 2012
Study guide production	October 8–26, 2012
Graphics production	October 8–26, 2012
Post production	November 5–19, 2012
Approval copy review	November 20, 2012
Revisions	November 26–28, 2012
Final master delivered	November 30, 2012

Any delay by BSP Energy in reviewing scripts, providing personnel, or locations, may delay delivery of the final video.

**BUDGET**

The services provided by Videologies will require the following development budget:

<b>Production Category</b>	<b>Amount</b>
Producer Services	\$ 2,800
Design, Analysis, and Research	2,800
Scriptwriting	2,800
Production Equipment	4,200
Production Crew	16,000
Talent	1,500
Other Misc. Production Costs (crew meals, videotape)	1,350
Graphics	1,250
Post Production (editing, music, and master duplication)	8,270
Travel Costs (hotel, car, air, per diem)	5,880
10% Cost Contingency for overtime and Videologies overages	4,685
<b>Total</b>	<b>\$51,535</b>

(continues)

## QUESTIONNAIRES AND SURVEYS

**Questionnaires and surveys** are used to gather data about customers and employees for use in decision making, marketing, and the development of new products and services. (Figure 3.60.)

Questionnaires can be distributed on paper or online. Online surveys are especially helpful because they can be emailed as links and the results can be automatically tabulated into a database or spreadsheet.

Using a questionnaire is a multistage process involving the design and development of the questions, determining the survey group, conducting the survey, and then interpreting the results.

Questionnaires are usually designed to gather qualitative or quantitative data.

- Qualitative surveys ask about opinions and ask respondents to rate the quality of a product or service.
- Quantitative surveys measure how many people do a particular thing, such as use a product or watch a particular television channel.

Questionnaires are often used instead of personal interviews because:

- They can be inexpensive to create and use.
- The privacy of the participants can be protected.
- When used with other data, such as sales trends, they can be useful as a confirmation tool.

Consider the following steps when creating a questionnaire:

- The first step in creating a questionnaire is to define the objectives.
  - The questions should focus on obtaining specific information.
    - To determine qualitative data about a product or service, you must break down the qualities into various aspects that can be isolated and measured.
  - The question order should have a logical flow.
- The second step in creating a questionnaire is to write the questions.
  - Write an introduction to the questionnaire that explains its purpose.



- Provide instructions on how to answer the questions.
  - Explain the rating scale if one is used.
- Include demographic questions to gather information about the respondents.
  - This information is helpful later when you are analyzing the results and comparing responses among different groups of people.
  - Common demographic questions, including age, sex, level of education, annual earnings, and so forth.
  - Demographic questions are normally asked at the beginning of the questionnaire.
- There are two general types of survey questions: multiple-choice or fill-in-the-blank.
  - Fill-in-the-blank questions are more time-consuming during the data analysis phase.
  - Multiple choice questions make it easier to tabulate the responses and calculate percentages.
  - Multiple-choice questions also make it easier to track opinions over time to see how the same questionnaire is answered by similar groups of people over a specific period.
- For multiple-choice questions involving a rating scale, it is best to have an even number of rating choices.
  - Having an odd number of choices leaves respondents with a middle neutral choice, which is often used by respondents who are bored.
  - Having an even number of choices eliminates the possibility of neutral answers.
- Multiple-choice questions should have clear, distinct answer choices.
  - “Very often,” “Often,” and “Sometimes” answer choices can be interpreted differently by different respondents.
  - “Every day,” “2 to 5 times a week,” and “Once a month” answer choices are easier to interpret.

Figure 3.60 Survey

U.S. DEPARTMENT OF COMMERCE  
Economic and Statistics Administration  
U.S. CENSUS BUREAU

This is the official form for all the people at this address.  
It is quick and easy, and your answers are protected by law.

United States  
**Census 2010**

Use a blue or black pen.  
**Start here**

The Census must count every person living in the United States on April 1, 2010.

Before you answer Question 1, count the people living in this house, apartment, or mobile home using our guidelines.

- Count all people, including babies, who live and sleep here most of the time.

The Census Bureau also conducts counts in institutions and other places, so:

- Do not count anyone living away either at college or in the Armed Forces.
- Do not count anyone in a nursing home, jail, prison, detention facility, etc., on April 1, 2010.
- Leave these people off your form, even if they will return to live here after they leave college, the nursing home, the military, jail, etc. Otherwise, they may be counted twice.

The Census must also include people without a permanent place to stay, so:

- If someone who has no permanent place to stay is staying here on April 1, 2010, count that person. Otherwise, he or she may be missed in the census.

**1. How many people were living or staying in this house, apartment, or mobile home on April 1, 2010?**

Number of people =

**2. Were there any additional people staying here April 1, 2010 that you did not include in Question 1? Mark  all that apply.**

Children, such as newborn babies or foster children  
 Relatives, such as adult children, cousins, or in-laws  
 Nonrelatives, such as roommates or live-in baby sitters  
 People staying here temporarily  
 No additional people

**3. Is this house, apartment, or mobile home — Mark  ONE box.**

Owned by you or someone in this household with a mortgage or loan? *Include home equity loans.*  
 Owned by you or someone in this household free and clear (without a mortgage or loan)?  
 Rented?  
 Occupied without payment of rent?

**4. What is your telephone number? We may call if we don't understand an answer.**  
 Area Code + Number  
 -  -

OMB No. 0607-0919-C: Approval Expires 12/31/2011.  
 Form **D-61** (1-15-2009)

**5. Please provide information for each person living here. Start with a person living here who owns or rents this house, apartment, or mobile home. If the owner or renter lives somewhere else, start with any adult living here. This will be Person 1.**  
 What is Person 1's name? *Print name below.*

Last Name

First Name  MI

**6. What is Person 1's sex? Mark  ONE box.**  
 Male  Female

**7. What is Person 1's age and what is Person 1's date of birth? Please report babies as age 0 when the child is less than 1 year old. Print numbers in boxes.**

Age on April 1, 2010  Month  Day  Year of birth

→ **NOTE: Please answer BOTH Question 8 about Hispanic origin and Question 9 about race. For this census, Hispanic origins are not races.**

**8. Is Person 1 of Hispanic, Latino, or Spanish origin?**

No, not of Hispanic, Latino, or Spanish origin  
 Yes, Mexican, Mexican Am., Chicano  
 Yes, Puerto Rican  
 Yes, Cuban  
 Yes, another Hispanic, Latino, or Spanish origin — *Print origin, for example, Argentinean, Colombian, Dominican, Nicaraguan, Salvadoran, Spaniard, and so on.* ↴

**9. What is Person 1's race? Mark  one or more boxes.**

White  
 Black, African Am., or Negro  
 American Indian or Alaska Native — *Print name of enrolled or principal tribe.* ↴

Asian Indian  Japanese  Native Hawaiian  
 Chinese  Korean  Guamanian or Chamorro  
 Filipino  Vietnamese  Samoan  
 Other Asian — *Print race, for example, Hmong, Laotian, Thai, Pakistani, Cambodian, and so on.* ↴  Other Pacific Islander — *Print race, for example, Fijian, Tongan, and so on.* ↴

Some other race — *Print race.* ↴

**10. Does Person 1 sometimes live or stay somewhere else?**  
 No  Yes — *Mark  all that apply.*

In college housing  For child custody  
 In the military  In jail or prison  
 At a seasonal or second residence  In a nursing home  
 For another reason

→ **If more people were counted in Question 1, continue with Person 2.**

U S C E N S U S B U R E A U

(Courtesy of the U.S. Department of Commerce)

## REFERENCE LETTERS

A **reference letter** states the qualifications for a person seeking employment. It offers an endorsement of the person's job performance, skills, and character. A reference letter may be accepted in lieu of contacting references on the phone.

A reference letter should include (Figure 3.61):

- How and for how long you know the person
- Your qualifications for writing the reference letter
- A list of the person's qualities and skills
- Key points about the person that the reader should note
- Examples that back up your opinions about the person
- Your contact information

Reference letters are typically written to:

- Recommend someone for a job.
- Recommend someone who has applied to school.
- Endorse a political candidate.
- Provide a credit reference.
- Recommend a service or product.
- Recommend someone for club membership.

## REFUSAL LETTER

A **refusal letter** is written to deny a request, decline an invitation, or reply negatively to a suggestion. When writing a refusal letter, consider the following tips (Figure 3.62):

- Be as diplomatic as possible to avoid hurt feelings.
- Open the letter with a sincere statement that explains that you are refusing the request.
- Explain your reasons for the refusal, and include any evidence to back up your decision.
- Offer alternatives to the readers that might have a better chance of being accepted.
- Be courteous and wish the reader success elsewhere.

Refusal letters are typically written to:

- Decline an invitation or appointment.
- Decline a claim request from a customer.
- Turn down a request for a donation.
- Decline a job offer, promotion, or transfer.
- Reject an application for employment.
- Decline to join an organization.
- Terminate a business relationship.
- Decline a request to write a letter of recommendation.
- Turn down a suggestion.
- Decline a request for credit.
- Decline a gift.
- Decline orders or requests for information.

**Figure 3.62** Refusal Letter

February 21, 2012

Buffalo Graphics  
3133 Highway 9  
Roswell, GA 32311

Dylan Wilson  
Atlanta Community College  
1311 West Northfield Drive  
Decatur, GA 30133

Dear Mr. Wilson:

Thank you for invitation to be a guest lecturer in your communications class at Atlanta Community College. I'm sorry, but I'll have to decline the invitation.

I recently became the president of the Atlanta Communications Association, and these added responsibilities have already required more time than I have available. I would suggest that you contact Al Gordon, the ex-president of ACA. He may be available and with his experience, he should make an excellent guest lecturer.

I am honored to have been invited by you. You are well respected within the communications industry, and I wish you all the best with your class.

Sincerely,

*Michael Woodson*

Michael Woodson  
President

- May contain tables and graphs and can be either single- or double-spaced.
- Contains headings and subheadings to organize the content and to emphasize certain aspects.
- Has a title page with:
  - The report title (long titles are divided and centered)
  - The name, title, and address of the person or company to whom the report is being submitted
  - The preparer's name, title, and address

### **Formal Report**

Included in the **formal report** are the:

- |                            |                         |
|----------------------------|-------------------------|
| ■ Cover                    | ■ List of tables        |
| ■ Title page               | ■ List of figures       |
| ■ Flyleaf                  | ■ Synopsis              |
| ■ Title fly                | ■ Body                  |
| ■ Letter of authorization  | ■ Endnotes or footnotes |
| ■ Letter of transmittal    | ■ Appendix              |
| ■ Foreword and/or prefaces | ■ Glossary              |
| ■ Acknowledgments          | ■ Bibliography          |
| ■ Table of contents        | ■ Index                 |

When formatting your report, consider the following guidelines:

- The margin settings for a formal report are:
  - First page's top margin—2 inches.
  - Subsequent pages' top margin—1 inch.
  - Bottom margins on all pages—1 inch.
  - The left and right margins on all pages—1 inch.
- For bound reports, the left margin should be 1½ inches to allow extra room for the binding.

- The body of the report can be single- or double-spaced.
- Setoff quotations should be single-spaced, as are footnotes.
- Paragraph indentions should be five spaces.
- Long quotations should be indented five spaces from the left margin.
- Numbered and bullet lists should also be indented five spaces.
- Footnotes should match paragraph margins.
- Primary headings should be centered and bold, with additional space above and below.
- A 20- to 24-point sans serif font, such as Helvetica, should be used.
- Secondary headings should be aligned left justified, bold, with a 16- to 18-point sans serif font.
- Third-level headings should also be aligned left and bold, with 12- to 14-point sans serif font.
- There should be no page number on the title page, although a page number should be assigned for numbering purposes.
  - The front matter should use small Roman numerals (i, ii, iii, etc.) for numbering.
  - The body of the report should use Arabic numerals, starting with 1.
  - Page numbers should be either centered or in the right margin, either  $\frac{1}{2}$  to 1 inch from the top or  $\frac{1}{2}$  inch from the bottom.

**Headings and subheadings** should be parallel in structure.

---

**Example of nonparallel structure:**

1. Reading the Manual
  2. The Instructions
  3. How to Install the Software
- 

**Example of parallel structure:**

1. Reading the Manual
  2. Following the Instructions
  3. Installing the Software
-

The **letter of authorization** should be printed on letterhead and explain who authorized the report and any specific details regarding the authorization.

The **letter of transmittal** (Figure 3.65) is a cover letter for the report. It explains the purpose of the report, the scope, limitations, reference materials, special comments, and acknowledgments.

The letter of transmittal may take the place of a **foreword** or **preface**.

The **acknowledgements** page should list individuals, companies, or institutions that assisted in creating the report.

The **table of contents** (Figure 3.66) should include headings, subheadings, and third-level headings with page numbers.

- You can use an outline style with a heading numbering system.
- If you are using a word processor, you can automatically generate a table of contents based on the heading styles.

If tables are used in the report, you should include a **list of tables** in the front matter. The list should include:

- Table numbers
- Page numbers
- The descriptions used as table titles in the body of the report

If illustrations are used in the report, you should include a **list of figures** (Figure 3.67) in the front matter. The list should include:

- Figure numbers
- Page numbers
- The captions used with the figures in the body of the report

The **body** of the report (Figure 3.68) should include:

- An introduction to the report.
- Introductions to the major sections—headings, subheadings, and third-level headings.
- A summary at the end of major sections.



- Normal paragraph breaks, bullet lists, numbered lists, illustrations, and tables.
- Footnotes or endnotes to present content that is not part of the main flow of the body.
- Footnotes are short notes set at the bottom of the page.
- Endnotes are placed at the end of the report.

Usually, footnotes or endnotes are numbered with a small, raised number (¹, ², etc.) inserted at the end of the text, with the correspondingly numbered note at the bottom of the page or at the end of the report.

Footnotes and endnotes should include:

- The author or author's names
- The title of the source
- The publisher
- The date
- A page reference

---

**Example:** ¹Kevin Wilson and Jennifer Wauson, *The AMA Handbook of Business Writing* (New York, AMACOM Books, 2010), page 201.

---

Sometimes a footnote is used for just the first reference to a source. Then, in subsequent references, just the author names and the page number are listed.

---

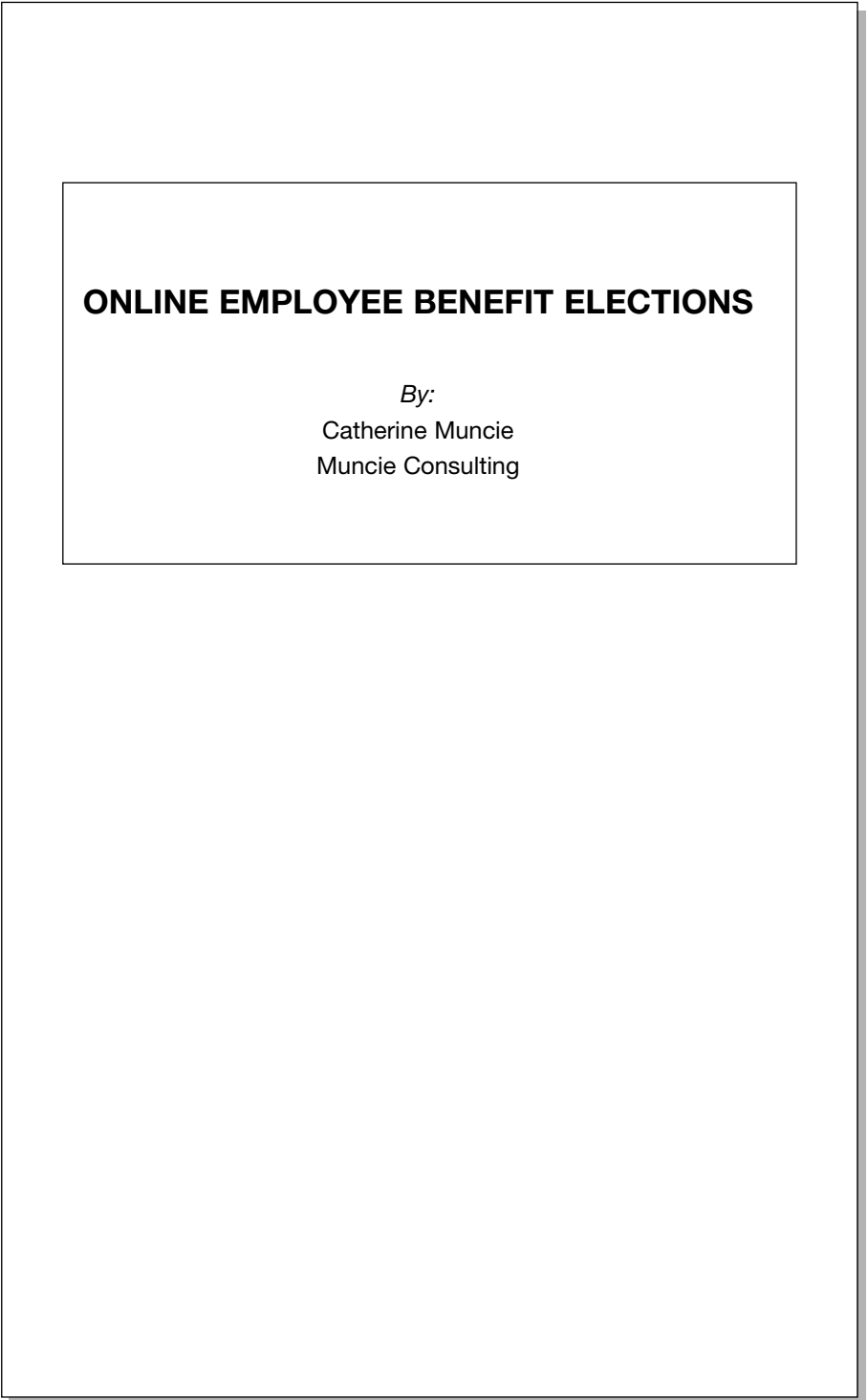
**Example:** Wilson and Wauson, 205.

---

Other parenthetical references are inserted in the text of the document inside parentheses.

If there are supplementary reference materials or sources of research—perhaps information that might be of interest to only some readers—you can include them at the end of the report in an **appendix**.

**Figure 3.64** Report Cover



**ONLINE EMPLOYEE BENEFIT ELECTIONS**

*By:*

Catherine Muncie  
Muncie Consulting

**Figure 3.65** Report Transmittal Letter

Muncie Consulting  
1231 Peachtree Street  
Atlanta, GA 30102

May 12, 2012

Mary Ann Cleveland  
Vice President  
Alstead Communications  
3324 Interstate 75 Parkway  
Atlanta, GA 30131

Dear Ms. Cleveland:

In accordance to our agreement for conducting research on alternatives to paper-based benefit elections, I am pleased to submit this report with my findings titled "Online Employee Benefit Elections."

The purpose of this report is provide information to the Alstead Communications Executive Board for the purpose of determining whether online employee self-service is a possibility for annual benefit elections. The report describes the online process and compares it to the current paper-based benefit election process. In addition, the report details various policies and controls that would need to be implemented in order to make online elections secure in order to protect sensitive personal information.

I hope you will find this report to be informative.

Respectfully yours,

*Catherine Muncie*

Catherine Muncie  
Muncie Consulting

Encl: Report on Online Employee Benefit Elections

**Figure 3.67** Report List of figures

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**Figure 3.68** Report Body

Report on  
**ONLINE EMPLOYEE BENEFIT ELECTIONS**

**I. Introduction**

During the annual benefits enrollment period, benefits-eligible employees may make changes to their benefits or enroll in flexible spending accounts for the upcoming plan year.

New benefit elections are effective January 1–December 31 of the following year. Once Open Enrollment has concluded, employees may change their benefits during the plan year only if they experience a qualified status change (marriage, divorce, birth/adoption of a child, or death of a dependent).

The human resources department must complete a number of tasks during August and September in order to ensure the online forms are correct. These tasks include the following:

- Determining wages for commissioned employees
- Verifying employment status
- Entering salary increases into the employee database
- Updating employee addresses

**Figure 3.69** Request Letter

May 8, 2012

Roswell News Weekly  
3233 Alpharetta Highway  
Roswell, GA 32311

Captain Larry Muncie  
United States Air Force  
Dobbins Air Force Base  
Atlanta, GA 30223

Dear Captain Muncie:

This is a request under the Freedom of Information Act (5 U.S.C § 552). I request that the following documents be provided to me:

1. Photographs of the B-29 airplane in the Dobbins Museum
2. Mission information for the B-29 airplane on display
3. Manufacturing information including when it was completed and what factory built the aircraft

To help you determine my status for the purpose of assessing fees, you should know that I am a representative of the news media affiliated with the *Roswell Weekly* newspaper, and this request is made as part of news gathering, not for commercial use.

I am willing to pay the appropriate fees for this request up to a maximum of \$25. If you estimate that the fees will exceed this limit, please contact me.

I have also included my telephone number and email address at which I can be contacted if necessary to discuss any aspect of my request.

Sincerely,

*Shelia Jefferson*

Shelia Jefferson

Staff Reporter

(770) 555-1234

SJefferson@rosweekly.com

## RESEARCH REPORT

**Research reports** summarize experimental findings and use additional reference sources to support the findings (Figure 3.70).

Research reports are commonly written in one of two ways:

- An argumentative research report makes a statement about a particular subject and then presents research to support the thesis.
- An analytical research report asks a question and then presents research describing various answers to the question.

A typical research report includes the following sections:

- Title page—a short 15-word-or-less description of the report
- Abstract—a short overview of the report that includes:
  - A statement of the problem
  - The study group
  - Dependent and independent variables
  - Research strategy
  - Major findings
  - Conclusions
- Introduction—a page that presents the investigated problem, explains the importance of the study, and supplies an overview of the research strategy
- Method—describing the sample, materials, and procedures used for the research (including all surveys, tests, questionnaires, interview forms, and laboratory equipment used in the research)
- Results—a summary of the findings from the research
- Discussion—an interpretation of the findings and the implications
- References—a list of sources used in the research

## Research Report Series

## Tobacco Addiction

to the Centers for Disease Control and Prevention there has been a decline of almost 50 percent since 1965.

NIDA's 2008 Monitoring the Future survey of 8th-, 10th-, and 12th-graders, which is used to track drug use patterns and attitudes, has also shown a striking decrease in smoking trends among the Nation's youth. The latest results indicate that about 7 percent of 8th-graders, 12 percent of 10th-graders, and 20 percent of 12th-graders had used cigarettes in the 30 days prior to the survey—the lowest levels in the history of the survey.

The declining prevalence of cigarette smoking among the general U.S. population, how-

ever, is not reflected in patients with mental illnesses. The rate of smoking in patients suffering from post-traumatic stress disorder, bipolar disorder, major depression, and other mental illness is two- to fourfold higher than in the general population; and among people with schizophrenia, smoking rates as high as 90 percent have been reported.

Tobacco use is the leading preventable cause of death in the United States. The impact of tobacco use in terms of morbidity and mortality to society is staggering.

Economically, more than \$96 billion of total U.S. health care costs each year are attributable directly to smoking.

However, this is well below the total cost to society because it does not include burn care from smoking-related fires, perinatal care for low-birthweight infants of mothers who smoke, and medical care costs associated with disease caused by secondhand smoke. In addition to health care costs, the costs of lost productivity due to smoking effects are estimated at \$97 billion per year, bringing a conservative estimate of the economic burden of smoking to more than \$193 billion per year.

### How Does Tobacco Deliver Its Effects?

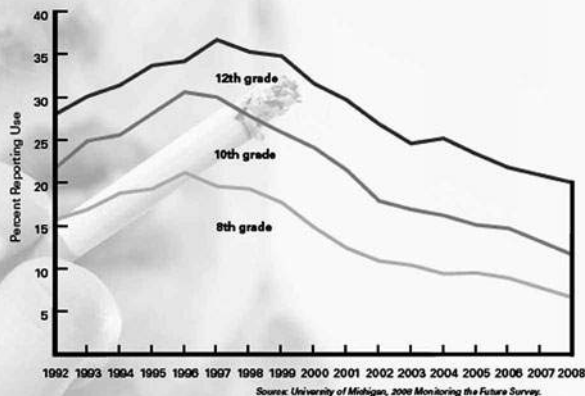
There are more than 4,000 chemicals found in the smoke of tobacco products. Of these, nicotine, first identified in the early 1800s, is the primary reinforcing component of tobacco.

Cigarette smoking is the most popular method of using tobacco; however, there has also been a recent increase in the use of smokeless tobacco products, such as snuff and chewing tobacco. These smokeless products also contain nicotine, as well as many toxic chemicals.

The cigarette is a very efficient and highly engineered drug delivery system. By inhaling tobacco smoke, the average smoker takes in 1–2 mg of nicotine per cigarette. When tobacco is smoked, nicotine rapidly reaches peak levels in the bloodstream and enters the brain. A typical smoker will take 10 puffs on a cigarette over a period of 5 minutes that

### Trends in Prevalence of Cigarette Use for 8th-, 10th-, and 12th-Graders

Percentage of Students Using Cigarettes Over a 30-Day Period, 1992–2008





## RESIGNATION LETTER

A **resignation letter** becomes part of your personnel file and may be seen by future employers or if you reapply at the same organization. When writing a resignation letter, consider these tips (Figure 3.71):

- Highlight your accomplishments at the organization because your letter may be read by colleagues.
- Avoid emotion and maintain your dignity.
- Highlight your skills using action verbs.
- Emphasize the contributions you have made to the organization—be positive.
- Show enthusiasm and appreciation for what you have accomplished at the organization.
- The terms of your resignation should attempt to maintain a good relationship with your employer.

Resignation letters are typically written to:

- Resign from a job.
- Announce your retirement.
- Resign for health reasons.
- Resign to take another job.
- Resign for family reasons.
- Take early retirement

## RÉSUMÉS

The purpose of a **résumé** is to get the reader to give you an interview. A résumé should summarize and organize the information so that the reader understands that you are qualified for the job.

All résumés should include:

- Your name, address, and telephone number
- Educational background (schools attended, degrees, diplomas, special training)
- A listing of all previous employment:
  - The date, job title, and organization
  - A brief description of your job
  - *Not* salary
- Information about your current job:
  - Skills you have acquired
  - Your responsibilities

Optionally, a résumé can also contain:

- A job objective, which:
  - Should be tailored to each job for which you apply.
  - State the reason you are submitting your résumé for a particular job.

---

**Example:** To obtain a management position in human resources for a large communications firm that utilizes my leadership and organization skills

---

- Special skills, such as:
  - Software packages you've used
  - Languages you speak, read, and/or write

- Professional association memberships
- Honors and awards

Do not include references in your résumé. Instead, state that “References are available upon request.” Have a list of references available with name, title, address, and phone number.

Use action verbs to describe your skills.

---

**Example:** Designed a new system to catch data entry errors.

---

Do not explain in your résumé why you are looking for a new job. Create several versions of your résumé, adapting the information to emphasize different skills required for different jobs. Emphasize your experience for various job possibilities.

There are two basic résumé formats:

- The history (or chronological) format focuses on where you have worked (Figure 3.72).
- The skills format lists skills you have acquired (Figure 3.73).

*(text continues on page 582)*

**Figure 3.73** Skills Format Résumé

Evelyn Flo Boyd  
12345 Heartside Drive  
Western Branch, GA 31234  
404-555-1234

**Experience**

**ADMINISTRATION**—Maintained files and records, accounts receivable, and customer database. Handled scheduling of business activities, all correspondence, and travel arrangements.

**SALES**—Worked with customers to set appointments and to sell photography services.

**VIDEO PRODUCTION**—Coordinated scheduling of crews and facilities. Hired freelance crews and outline equipment rentals.

**TECHNICAL SKILLS**—Complete understanding of IBM-compatible software including Windows, Word for Windows, Excel, and WordPerfect. Also, some understanding of Apple Macintosh computers including Microsoft Word and Excel. Good typing skills, 50 wpm. Working knowledge of most office equipment, copiers, fax machines, and typewriters.

**Work History**

2009–Present  
Office Manager and Assistant to Business Owner  
Lyon’s Still Photography  
Acworth, Georgia

1997–2009  
Office Assistant  
Third Coast Video, Inc.  
Austin, Texas

**Education**

1993-1997: B.A. English  
University of Texas  
Austin, Texas

References furnished upon request.

## SALES LETTERS

**Sales letters** are written to catch the attention of readers in an attempt to sell them a product or service. When writing a sales letter, consider these tips (Figures 3.74 and 3.75):

A good sales letter focuses on what interests the readers:

- The benefits to the customer
- How the customer will use the product or service

If the letter is not personally addressed to the reader, start the letter with a headline that:

- Describes the key benefit to the reader.
- Uses power words such as *free*, *proven*, *imagine*, *how to*, *fast*, *cheap*, *save*, *enjoy*, and *introducing*.
- Gets the reader's attention, targets the audience, lists a benefit, and makes a promise.

---

**Example:** How to save 50% or more on office furniture

---

If the letter is personally addressed, the opening sentence becomes the headline.

---

**Example:** Dear Mr. Smith: How would you like to save 50% or more on office furniture for your business?

---

Keep the letter brief but interesting. Use short sentences, short paragraphs, bullet points, indented paragraphs, and subheadings to design the look of the letter and to make it visually attractive.

Start the letter by identifying the unique selling point of the product or service. Consider the following possibilities:

- Tell a story about the product or service and how it was used.
- Make an announcement of some important news about the product or service.
- Ask the reader a question that involves the unique selling point.

**Figure 3.74** Sales Letter

Business Furniture Liquidators  
1245 North Main Street  
Atlanta, Georgia 30322  
December 1, 2012

Martha Sanchez  
First Insurance  
3211 Lake Tarn Terrace  
Acworth, GA 30188

Dear Ms. Sanchez:

How would you like to save up to 75% on name-brand office furniture? Business Furniture Liquidators specializes in preowned Herman Miller and Steelcase desks and chairs. Why pay full price for new office furniture when you can get quality refurbished furniture at up to 75% off?

Are you planning to expand your business or upgrade your existing offices? Business Furniture Liquidators can help you design and furnish offices, reception areas, and conference rooms. We have a network of distributors throughout the southeast that allow us to offer you a wide range of choices at a price you can afford. We'll personally deliver and install your furniture to ensure your satisfaction.

Visit our Web site at [www.bfl.com](http://www.bfl.com) or call us at 1-800-555-1212 to request a free quote. You'll find daily specials on our Web site and pictures of our latest offerings.

Sincerely,

*Warren Gladson*

Warren Gladson  
1-800-555-1212  
Wgladson@bfl.com  
[www.bfl.com](http://www.bfl.com)

P.S. For the month of December we are having a liquidation sale on all Herman Miller office chairs. This is a great opportunity for you to upgrade your office chairs to ergonomically friendly Herman Miller chairs at 80% off the retail price. Call or email me today for an inventory list and a price quote.

**Figure 3.75** Sales Letter

Realty Investors  
7788 Princeton Avenue  
St. Louis, MO 63107

**Do you have a house you would like to sell?**

Dear Homeowner,

Do you own a home in St. Louis that you would like to sell? If so, we would like to meet with you to discuss some great opportunities.

Realty Investors specializes in helping investors find great opportunities in rental properties. We work with a large network of investors who are interested in purchasing rental properties. If you are interested in selling your property, now is a great time to talk to us and let us help you get the best price possible.

Last year, we helped our investors purchase over \$20 million in properties in the St. Louis metro area and this year we will easily exceed that amount.

**Here is a list of properties our investors are looking for:**

- Single-family, 2- or 3-bedroom homes priced under \$150,000
- Duplexes with 2 bedrooms and 1 bath on each side
- Mobile homes
- Two-story homes of any size

If you own a property like one of these, please give me a call and let me conduct a property evaluation. There's no obligation to sell, and the evaluation is completely free.

Selling your property with Realty Investors is an outstanding opportunity.

I look forward to hearing from you.

Sincerely,

*Bill Stovall*

Bill Stovall

(314) 555-1212

**Figure 3.76** Seasonal Correspondence

Acme Auto Supply  
5353 Buffalo Speedway  
Houston, TX 77097

December 7, 2012

Jeff Richardson  
Jeff's Auto Repair  
3221 Stella Link  
Houston, TX 77098

Dear Mr. Richardson,

With the holiday season approaching, there is so much personal and business activity to take care of that it is sometimes easy to forget to thank our great customers who have helped make it a great year for us.

I want to personally thank you for your business and for being a loyal customer of Acme Auto Supply.

May this holiday season bring happiness to you and your family.

Very truly yours,

*Sam Henderson*

Sam Henderson  
(713) 555-1212



## SPECIFICATIONS

**Specifications** appear in various forms—the design of high-tech products, software development, engineering, and architecture (Figure 3.77). Specifications dictate the design of the project. They describe how the product should appear when completed. They can be included as part of a contract.

There are four major types of specifications:

- Requirement specifications (architecture and engineering) describe:
  - A product during the design phase
  - The functions the product will be capable of performing
  - The costs involved in making the product
- Functional specifications (manufacturing) describe:
  - The purpose, use, and operation of the product
  - How the components work together
  - The electronics that will be used
  - The power requirements
  - The production and maintenance costs
- Design specifications (software) describe:
  - The documents that contain information about the product
  - The product's functions, what it does, and how it does it
  - Any external components that interface with the product
  - The details of all the products' functions
  - The power requirements
- Test specifications (manufacturing and software) describe:
  - All the tests that will be run on the product during the development phase
  - All the tests that will be run on the production version of the product.

When writing specifications, keep the following language usage guidelines in mind:

- Keep sentences short and simple.

- Use caution when writing essential and nonessential dependent clauses with words like *that* and *which*.
  - Essential clauses are required to specify a particular item and are often introduced by *that*.
  - Nonessential clauses are not required to specify anything and are often introduced using *which*.
  - Other introductory words that introduce essential and nonessential clauses are *after, as, as if, as though, as soon as, at which, because, before, by which, for which, if, in order that, since, so that, to which, unless, when, where, which, while, who, whom, and whose*.
- Avoid using multiple conjunctions in the same sentence.

---

**Incorrect:** The cabin door will be sealed by gluing and clamping or riveting.

**Correct:** The cabin door will be sealed either by gluing and clamping or by riveting.

---

- Use the third person.

---

**Incorrect:** You will push the green on-screen **Start** button to begin the test.

**Correct:** The operator will push the green on-screen **Start** button to begin the test.

---

- When including lists in specifications, make sure they are complete and parallel in structure.
  - The elements of the list should be the same part of speech.

**Figure 3.77** Specifications**STUDENT COMPUTER SPECIFICATIONS**

All students are required to have a desktop or laptop computer as well as a printer for use throughout the school year. Computers must also include a three-year on-site warranty for parts and labor, as well as telephone or Internet support.

**Operating System**

- Windows 7

**Software Suite**

- Microsoft Office Professional with Word, Excel, PowerPoint, and Outlook
- Internet Explorer browser
- Norton Antivirus

**Computer Hardware**

- Processor speed of at least 2 GHz
- Memory (RAM) of 2 GB or more
- Hard disk drive of at least 100 GB
- DVD burner CD-RW combo disc drive
- 19-inch flat panel display
- Inkjet printer and printer cable plus three additional sets of replacement ink cartridges
- 10/100Base-T Ethernet card or wireless Ethernet card
- USB Flash memory stick with at least 1 GB of capacity
- Multimedia sound capability
- Headphones

## SPEECHES AND ORAL PRESENTATIONS

Writing a **speech** involves writing a script that can be memorized or read from a teleprompter, as well as speaker notes that the speaker can refer to during the presentation. (Figure 3.78.)

In *planning* a speech, keep the following in mind:

- Is the purpose of the speech to inform, instruct, or persuade?
  - An informational speech focuses on facts.
  - An instructional speech explains how to do something.
  - A persuasive speech attempts to convince the audience to think and act a certain way.
- Consider the audience for the speech and the location.
  - The audience and location will affect the tone of the speech.
  - Consider what the members of the audience have in common, such as age, interests, gender, and ethnicity.
  - Consider how much the audience already knows about the topic.
    - Will they already be familiar with the content, or will you be introducing new ideas?
    - What level of detail is appropriate for the audience?
    - What might offend the audience?
- Plan the presentation to avoid standing behind a podium.
  - Walk around but don't pace.
  - Plan on addressing different parts of the audience rather than one or two people in the front row.
- Determine whether accompanying visuals are appropriate. They may be appropriate depending on the audience and location.

In *writing* a speech, consider the following:

- Write a good introduction that gives a short overview and creates interest.
  - Create a hook that captures the audience's attention.
    - Offer shocking statistics.
    - Ask a thought-provoking question.
- Establish the reason you are speaking and why your topic is important.
  - Describe the topic from the audience's point of view.
- Divide your speech into sections, and give each section a verbal title.
- Use summaries and logical transitions to move from one section to the next.
  - Repeat crucial points to remind the audience.
  - Repeat crucial buzzwords to reinforce their meaning.
  - Use powerful transitions to reinforce or contrast ideas.
- Write the speech with short uncomplicated sentences.
  - Avoid using too many subordinate clauses.
  - Avoid the use of too many pronouns; it is hard for an audience to remember who and what *it*, *they*, and *this* mean.
- Use the strategies of ethos, pathos, and logos.
  - Ethos builds trust between the speaker and the audience.
  - Pathos appeals to the audience's emotions.
  - Logos provides facts, statistics, and logic.
- Conclude the speech by summarizing, stating your own conclusion, and then adding last thoughts as commentary.
  - Restate the main points of the speech, but don't repeat them the same way they were originally delivered.
  - End with a call to action that creates a connection with the audience.

*(text continues on page 598)*

**Figure 3.78** Speech by John F. Kennedy**ASK NOT WHAT YOUR COUNTRY CAN DO FOR YOU**

By John F. Kennedy

Vice President Johnson, Mr. Speaker, Mr. Chief Justice, President Eisenhower, Vice President Nixon, President Truman, reverend clergy, fellow citizens, we observe today not a victory of party, but a celebration of freedom—symbolizing an end, as well as a beginning—signifying renewal, as well as change. For I have sworn before you and Almighty God the same solemn oath our forebears prescribed nearly a century and three quarters ago.

The world is very different now. For man holds in his mortal hands the power to abolish all forms of human poverty and all forms of human life. And yet the same revolutionary beliefs for which our forebears fought are still at issue around the globe—the belief that the rights of man come not from the generosity of the state, but from the hand of God.

We dare not forget today that we are the heirs of that first revolution. Let the word go forth from this time and place, to friend and foe alike, that the torch has been passed to a new generation of Americans—born in this century, tempered by war, disciplined by a hard and bitter peace, proud of our ancient heritage—and unwilling to witness or permit the slow undoing of those human rights to which this Nation has always been committed, and to which we are committed today at home and around the world.

Let every nation know, whether it wishes us well or ill, that we shall pay any price, bear any burden, meet any hardship, support any friend, oppose any foe, in order to assure the survival and the success of liberty.

This much we pledge—and more.

To those old allies whose cultural and spiritual origins we share, we pledge the loyalty of faithful friends. United, there is little we cannot do in a host of cooperative ventures. Divided, there is little we can do—for we dare not meet a powerful challenge at odds and split asunder.

To those new States whom we welcome to the ranks of the free, we pledge our word that one form of colonial control shall not have passed away merely to be replaced by a far more iron tyranny. We shall not always expect to find them supporting our view. But we shall always hope to find them strongly supporting their own freedom—and to remember that, in the past, those who foolishly sought power by riding the back of the tiger ended up inside.

To those peoples in the huts and villages across the globe struggling to break the bonds of mass misery, we pledge our best efforts to help them help themselves, for whatever period is required—not because the Communists may be doing it, not because we seek their votes, but because it is right. If a free society cannot help the many who are poor, it cannot save the few who are rich.

To our sister republics south of our border, we offer a special pledge—to convert our good words into good deeds—in a new alliance for progress—to assist free men and free governments in casting off the chains of poverty. But this peaceful revolution of hope cannot become the prey of hostile powers. Let all our neighbors know that we shall join with them to oppose aggression or subversion anywhere in the Americas. And let every other power know that this Hemisphere intends to remain the master of its own house.

To that world assembly of sovereign states, the United Nations, our last best hope in an age where the instruments of war have far outpaced the instruments of peace, we renew our pledge of support—to prevent it from becoming merely a forum for invective—to strengthen its shield of the new and the weak—and to enlarge the area in which its writ may run.

Finally, to those nations who would make themselves our adversary, we offer not a pledge but a request: that both sides begin anew the quest for peace, before the dark powers of destruction unleashed by science engulf all humanity in planned or accidental self-destruction.

We dare not tempt them with weakness. For only when our arms are sufficient beyond doubt can we be certain beyond doubt that they will never be employed.

*(continues)*

**Figure 3.78** *(continued)*

But neither can two great and powerful groups of nations take comfort from our present course—both sides overburdened by the cost of modern weapons, both rightly alarmed by the steady spread of the deadly atom, yet both racing to alter that uncertain balance of terror that stays the hand of mankind's final war.

So let us begin anew—remembering on both sides that civility is not a sign of weakness, and sincerity is always subject to proof. Let us never negotiate out of fear. But let us never fear to negotiate.

Let both sides explore what problems unite us instead of belaboring those problems which divide us.

Let both sides, for the first time, formulate serious and precise proposals for the inspection and control of arms—and bring the absolute power to destroy other nations under the absolute control of all nations.

Let both sides seek to invoke the wonders of science instead of its terrors. Together let us explore the stars, conquer the deserts, eradicate disease, tap the ocean depths, and encourage the arts and commerce.

Let both sides unite to heed in all corners of the earth the command of Isaiah—to “undo the heavy burdens—and to let the oppressed go free.”

And if a beachhead of cooperation may push back the jungle of suspicion, let both sides join in creating a new endeavor, not a new balance of power, but a new world of law, where the strong are just and the weak secure and the peace preserved.

All this will not be finished in the first 100 days. Nor will it be finished in the first 1,000 days, nor in the life of this Administration, nor even perhaps in our lifetime on this planet. But let us begin.

In your hands, my fellow citizens, more than in mine, will rest the final success or failure of our course. Since this country was founded, each generation of Americans has been summoned to give testimony to its national loyalty. The graves of young Americans who answered the call to service surround the globe.



Now the trumpet summons us again—not as a call to bear arms, though arms we need; not as a call to battle, though embattled we are—but a call to bear the burden of a long twilight struggle, year in and year out, “rejoicing in hope, patient in tribulation”—a struggle against the common enemies of man: tyranny, poverty, disease, and war itself.

Can we forge against these enemies a grand and global alliance, North and South, East and West, that can assure a more fruitful life for all mankind? Will you join in that historic effort?

In the long history of the world, only a few generations have been granted the role of defending freedom in its hour of maximum danger. I do not shrink from this responsibility—I welcome it. I do not believe that any of us would exchange places with any other people or any other generation. The energy, the faith, the devotion which we bring to this endeavor will light our country and all who serve it—and the glow from that fire can truly light the world.

And so, my fellow Americans: ask not what your country can do for you—ask what you can do for your country.

My fellow citizens of the world: ask not what America will do for you, but what together we can do for the freedom of man.

Finally, whether you are citizens of America or citizens of the world, ask of us the same high standards of strength and sacrifice which we ask of you. With a good conscience our only sure reward, with history the final judge of our deeds, let us go forth to lead the land we love, asking His blessing and His help, but knowing that here on earth God’s work must truly be our own.

## SUMMARIES

**Summary writing** is a way of organizing and summarizing information that condenses large quantities of information into a shorter version that can be used for easy reference.

In technical writing, summary writing is employed to create abstracts, which provide a brief overview of a document.

To write summaries or abstracts, do the following (Figure 3.79):

- Read the longer document thoroughly, and make sure you completely understand the content.
- Review the longer document a second time, and strike out material that you feel isn't necessary and underline the most important points.
- Write a summary in your own words, following the organization of the original material.
- Mention the author, title, and publication date.
- Avoid unnecessary details and quotes.
- Don't give your own opinion.
- Any material used verbatim from the original should be properly documented.
- Compare your draft summary with the original for accuracy.
- The finished summary should be no longer than 20% of the original's length.

*(text continues on page 602)*

Figure 3.79 Summary

## ENERGY AND ECONOMIC IMPACTS OF IMPLEMENTING BOTH A 25-PERCENT RPS AND A 25-PERCENT RFS BY 2025

### 1. Background and Scope of the Analysis

#### Background

This Service Report was prepared by the Energy Information Administration (EIA) in response to a request from Senator James Inhofe.<sup>5</sup> Senator Inhofe requested an analysis of a proposal (referred to as the 25 × 25 Policy Scenario in his letter request) to achieve a 25-percent renewable portfolio standard (RPS) and a 25-percent renewable fuel standard (RFS) by 2025. The combined RPS and RFS policy proposal is referred to as “the Policy” hereafter in the report. Copies of the request letter and a follow-up letter of clarification are provided in Appendix A.

#### Proposal Summary

The proposal analyzed in this study has two components: (1) an RPS, which requires that the percentage of electricity sales produced from renewable sources, excluding existing hydroelectric generation, must reach 25 percent by 2025; and (2) an RFS, which requires that the volumetric percentage of the transportation gasoline and diesel fuel market supplied from renewable resources, in the form of ethanol and biodiesel, must reach 25 percent by 2025 and then grow proportionately with growth in demand for transportation gasoline and diesel fuel. Each sector (electricity sales and gasoline plus diesel transport fuels) is required to meet its own target by 2025. Twenty-five percent of electricity sales would be from renewable generators and 25 percent of gasoline plus diesel fuel sales would be from either ethanol or biodiesel on a volumetric basis.

A key assumption in both the electricity and transportation sectors is that all tax or other policy incentives for domestic renewable fuels and ethanol import tariffs in current laws and regulations are allowed to sunset without extension.

The RPS target in the electricity sector is implemented using a credit trading system, where the qualifying renewables include:

**Figure 3.79** (continued)

- Biomass used in dedicated plants or co-fired with other fuels
- Geothermal
- Municipal solid waste (including landfill gas)
- Solar thermal
- Photovoltaic (PV)
- Wind (both onshore and offshore)
- Incremental new hydroelectricity above that existing in 2006

Further, existing qualifying generators, except existing hydroelectricity, receive credits under the proposed Policy. The renewable share is expressed as a share of electricity sales in kilowatt hours. The required share is set equal to the share of qualifying renewable generation sales in 2006 and increases to 25 percent in 2025. Thereafter, it is held at 25 percent. All retail electricity sellers are included. RPS credit trading is allowed only within the electricity sector, and there is no cap on the credit price.

The RFS target for the motor transportation sector is also implemented using tradable credits, where the qualifying renewable fuels include:

- Corn-based ethanol
- Cellulose-based ethanol
- Biodiesel production from all sources, including animal fats and oil-based beans/seeds

As with the RPS, existing qualifying sources receive credits. The renewable share is expressed as a share of all liquids sold in the motor transportation sector that displace either gasoline or diesel. The required share is set equal to the share of qualifying renewables sold in 2006 and increases to 25 percent in 2025. Thereafter, it is held at 25 percent. RFS credit trading is allowed only within the transportation sector, and there is no cap on the credit price. The existing import tariff on Brazilian ethanol imports (51 cents per gallon) is allowed to sunset in 2010. Finally, measures that facilitate compliance with the RFS, such as mandates to produce Flex Fuel Vehicles (FFVs) and the availability of E85 pumps at gasoline dispensing stations, are assumed as stipulated in Senate Bill 23 (S.23).

**General Methodology**

In this study, analyses of the energy sector impacts and energy-related economic impacts of the Policy proposal are based on the Annual Energy Outlook 2007 (AEO2007)<sup>6</sup> reference and high price cases, as amended to allow for the additional assumptions and modeling enhancements necessary to evaluate the proposal. As in the preparation of the Annual Energy Outlook and most EIA service reports, the National Energy Modeling System (NEMS) was used to evaluate the impacts of the Policy Case and alternative assumptions.

A number of changes were made in NEMS to address the Policy and to include enhancements relevant to the analysis. They included changes to the macroeconomic module to improve the representation of the impact on the entire economy of price increases for agricultural products, motor fuel, and electricity; changes in the Petroleum Market Module to ensure convergence of NEMS; and changes to the Renewable Fuels and Transportation Modules to incorporate the proposal's mandates. The changes made to the AEO2007 NEMS are summarized in Appendix B.

**Sensitivity Cases**

In addition to the four cases requested by Senator Inhofe (Reference, High Price, Policy, and High Price Policy), four additional cases are provided to illustrate the impacts of higher availability of ethanol imports and more optimistic assumptions for the cellulosic ethanol technology: Low-Cost Ethanol Imports, Low-Cost Ethanol Imports Policy, High Renewable Technology, and High Renewable Technology Policy. The cases analyzed for this request are shown in Table 1. High Renewable Technology and High Technology are used interchangeably throughout this text.

## TERMINATION OF EMPLOYMENT LETTER

A **termination of employment letter** is an official announcement regarding a layoff or firing. A termination letter should come at the end of a termination process that involves personnel meetings.

Termination letters are usually written because of redundancy in positions, misconduct by an employee, or poor performance.

A termination of employment letter should (Figure 3.80):

- Be courteous and professional.
- Start by announcing the termination and the effective date.
- State the reasons for the termination.
- Clearly state any individual requirements, such as the return of a company car, credit card, computer, or cell phone.
- Clearly state any details regarding pay, holiday pay, benefits, pension, and other financial settlement.
- Describe the appeals process and schedule if an appeals process is required due to state law or union contract.
- Include a place for the employee to sign to confirm receipt of the letter.

**Figure 3.80** Termination Letter

Credit Corp America  
4300 Interstate Parkway  
Dallas, TX 75301  
September 6, 2012

Mary Sullivan  
6426 Lakewood Blvd  
Dallas, TX 75214

Dear Mrs. Sullivan:

As we discussed in our meeting on September 5, 2012, I regretfully must inform you that your employment with Credit Corp America will be terminated today, September 6, 2012.

As described in our meeting, the reason for termination of your employment is your failure to meet your sales quotas. You failed to meet your monthly quota three months ago and were given a warning at that time. You have continued to miss your quota for each of the past three months.

As part of the termination process, you must return your sales literature, customer lists, and company laptop.

You will receive two weeks' pay, which will be sent to your home within the next five days. You will also retain your 401(k) account. Your health insurance benefits will continue through the end of September. At that time, you have the option of continuing your coverage by purchasing it through the COBRA program.

To acknowledge your receipt of this letter, please sign and date below and return it to me.

We are sorry to see you leave and wish you the best for the future.

Yours,

*Mary Ann Lemer*  
Mary Ann Lemer  
Vice President of Sales

I acknowledge receipt of this letter.

\_\_\_\_\_  
Mary Sullivan

\_\_\_\_\_  
Date

## TRAINING MANUAL

**Training manuals** are designed to instruct the reader on how to do something. There are two main types of training manuals:

- **Instructor-led manuals** may rely on lectures and demonstrations by the instructor (Figure 3.81).
- **Self-paced training manuals** must provide more instructions than an instructor-led manual (Figure 3.82).

A typical training manual includes:

- Cover (Figure 3.83)
- Table of contents (Figure 3.84)
- How-to-get-started information (Figure 3.85)
- Lesson modules
- Appendix items
- Glossary
- End-of-course quiz (Figure 3.86)
- Course evaluation form (Figure 3.87)

Training manuals are normally divided into lessons or topics. A typical lesson includes:

- Lesson overview and objectives (Figure 3.88–3.89)
- Explanation in the form of headings, subheadings, paragraphs of text, and lists
- Illustrations, diagrams, charts, screen captures, or photographs.
- Tables (Figure 3.90)



- Step-by-step instructions (Figure 3.91)
- Use of bold, italics, and all caps to highlight actions to be taken by the participant
- Exercises (Figure 3.92)
- Quizzes
- Summaries

Instructor-led manuals may include:

- Copies of PowerPoint slides used by the instructor as visual aids
- Speaker notes that summarize the instructor's lecture
- Speaker notes in the participant's version of the manual

Notes and warning messages may be formatted with icons and graphic boxes to focus the student's attention.

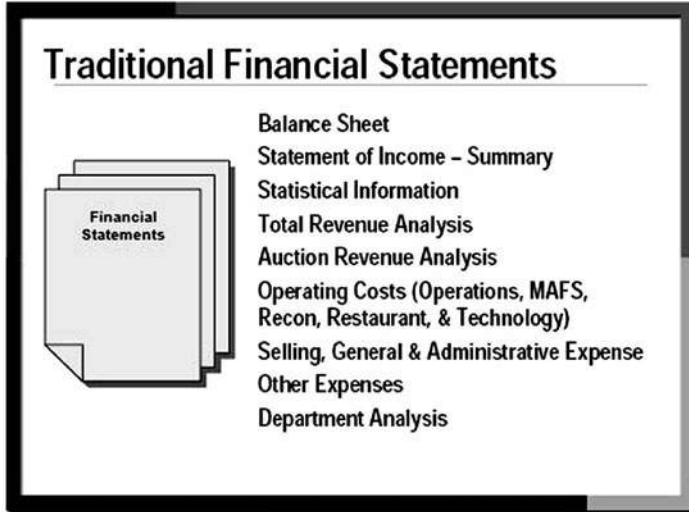
Training manuals may be integrated with other forms of instruction, such as:

- Hands-on exercises
- Team exercises
- Exercises involving online simulations
- Videos and audio recordings
- Computer-based training
- Webinars
- Job aids

*(text continues on page 618)*

Figure 3.81 Instructor-Led Training Manual

# Topic 1: Traditional Financial Statements



Traditional financial statements include information such as the current month, prior year, budget, year-to-date, and variance percentages. The traditional financial statements include:

- Balance Sheet
- Statement of Income – Summary
- Statistical Information
- Total Revenue Analysis
- Auction Revenue Analysis
- Operating Costs (Operations, MAFS, Recon, Restaurant, & Technology)
- Selling, General & Administrative Expense
- Other Expenses
- Department Analysis (One Statement of Income for each Department)

The Department Analysis provides the detail of revenues and expenses, gross profit, gross profit margin, IBD, and IBD Margin for each department and/or profit center, thus providing a basis to analyze operational performance by type of service.

Figure 3.82 Self-Study Training Manual

## Managing Performance Everyday

## PERFORMANCE EVALUATION FORMS

For recording your written performance evaluation, Manheim has three Performance Expectations and Review forms:

- Employee form
- Managers, Supervisors, and Professional form
- Basic form

### Goals

Page one of the form includes space for writing the goals for the year along with the tracking method. The first page should have been completed at the beginning of the review period. During the evaluation, you will determine if the goals were achieved. There are four possible ratings for each goal on the form: exceeded, met, did not meet, and not applicable.

Goals for the Review Period						
Identify three goals to be accomplished during the review period by thinking of the key responsibilities for this job. At the end of the performance period, rate how well these goals were achieved.						
Goals for the Review Period		Tracking Method	Were the goals achieved?			
Make goals SMART: Specific, Measurable, Attainable, Realistic, and Timely		How we know it was achieved	Exceeded	Met	Did Not	N/A
1	Maintain current Cust Sat Rating of 98%	Customer Survey	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
2	Increase dealer use of Recon Services over current level	Recon Sales Report	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3	Increase dealer sales percentage by 5%	Dealer Sales Report	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Figure 3.83 Training Manual Cover

# *Managing Performance*

EVERYDAY

**PART 3:  
Evaluate for Performance**

**Training Guide**

Figure 3.84 Training Manual Table of Contents

<b>Table of Contents</b>	
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Figure 3.85 Training Manual Getting-Started Page

## How to Take a Self Study Course

### Welcome to Finance Training Self Study

This self study course allows you to learn independently and at your own pace. It contains many learning elements including a written presentation, associated activities, and online simulations and practices.

### How to Take This Course



Study the written documentation and complete the associated activities, online simulations and online practice exercises.

Once you complete the course, you must register for the associated quiz on LMS and pass with an 80% or greater to receive credit for the self study.

### Online Simulations:

Throughout the self study course, you will be able to watch demonstrations and then practice the same concepts in a simulated environment.

Self study online simulations allow you to view content in either See It! or Try It! mode.

Mode	Name	Description
	See It!	See It mode enables you to learn about the selected topic by displaying an animated demonstration of a task being completed.
	Try It!	Try It mode allows you to perform the selected task in a simulated environment

### Steps to run simulations and practice exercises:

1. Access online simulations through the website and select the Online Simulations link.
2. Next, select the module you're studying.
3. This will launch the simulation player in a new window.
4. From this window, choose the topic you'd like to view in either See it! or Try it! mode.

Figure 3.86 Training Manual Quiz

## Managing Performance Everyday

**Quiz**  
**Which Rating Error Are They Making?**

1. Bob's latest project was great. He did miss on projects in the first half of the year, but he turned around nicely. I'm going to rate him exceeded expectations.
  - a. Rating effort rather than performance
  - b. Recent work focus (Recency Effect)
  - c. Halo or horns effect
2. Stan made some people upset in the process, but he did get the job done. I'm going to rate him exceeded expectations.
  - a. No news is good news
  - b. Halo or horns effect
  - c. Central tendency
3. Sara is one of my best friends, even though her performance is falling. I'm going to rate her meets expectations.
  - a. Interpersonal relations bias
  - b. Just like me or not like me
  - c. Judging by association
4. There are no superstars in my book.
  - a. Central tendency
  - b. Judging by association
  - c. Strictness
5. Janice and I used to work together at another company. We both understand what it takes to get ahead in this world.
  - a. Leniency
  - b. Just like me or not like me
  - c. Central tendency

Figure 3.87 Training Manual Course Evaluation

## Module 6: Activities

## Participant Feedback Survey

Please take a moment to complete the following survey. We are interested in learning about your experience with this course.

### Instructor's Name

---

### Instructions

Please answer the questions below by circling the appropriate number on the right.

### Scale

Strongly Disagree 1..2..3..4..5 Strongly Agree

1) I feel comfortable working with financial statements,	1..2..3..4..5
2) I feel comfortable finding information within the balance sheet.	1..2..3..4..5
3) I feel comfortable finding information within the statement of income.	1..2..3..4..5
4) I feel comfortable finding trends and other relationships within the financial statement data.	1..2..3..4..5
5) This course has taught me skills I need in my job,	1..2..3..4..5
6) The instructor effectively presented the course,	1..2..3..4..5
7) The instructor provided answers to my questions,	1..2..3..4..5



Figure 3.88 Training Manual Course Objectives

## INTRODUCTION AND COURSE AGENDA

Welcome to the third module of Managing Performance Everyday. In this course, Evaluate for Performance, you will learn how to effectively evaluate performance and get prepared to confidently and respectfully discuss with your employees their performance and upcoming goals.

### *Performance Management Cycle*

- **Set Goals** or expectations with your employees.
- **Feedback** is ongoing and lets employees know how they are doing and reinforces what the manager expects from the employee every day.
- **Track** how employees are doing against their goals.
- **Coach** the employee to make improvements.
- **Evaluate** the employee's performance on how they did against their goals and set new goals for next year.



Figure 3.89 Training Manual Lesson Contents and Objectives

Module 4: Accounting for Holds Roll-Forward Transactions

# Module 4 Accounting for Holds Roll-Forward Transactions

This module focuses on the accounting procedures for Holds Roll-Forward transactions.

## Module Objectives

This module explains:

- How to perform the accounting entries necessary to perform Holds Roll-Forward

## Module Contents

This module contains the following topics:

Debits & Credits .....	4-3
Identifying Manheim GL Accounts .....	4-4
Journal Entry: Money Deposit (Not a Draft) .....	4-5
Journal Entry: Wire/ACH.....	4-6
Journal Entry: Wire/ACH.....	4-7
Journal Entry: Wire/ACH.....	4-8
Journal Entry: Draft Deposit Part 1 .....	4-9
Journal Entry: Draft Deposit Part 2 .....	4-10
Journal Entry: Draft Deposit Part 2 – Texas Lockbox .....	4-11
Journal Entry: Dummy Deposit .....	4-12
Journal Entry: Void.....	4-13
Journal Entry: MyAccount Payment.....	4-15
Journal Entry: MAFS Intercompany .....	4-16
Journal Entry: Return Check – Part 1 .....	4-17
Journal Entry: Return Draft – Part 1.....	4-18

Figure 3.90 Training Manual Table Reference

## Oracle Forms Icons

















Icons		
Icon	Name	Description
	New	Creates a new record in the active form.
	Find	Displays the Find window to retrieve records.
	Show Navigator	Displays the Navigator window.
	Save	Saves any pending changes in the active form.
	Switch Responsibility	Allows you to select another Responsibility if you have more than one Responsibility.
	Print	Prints the current screen that the cursor is in. In some cases it may print a report associated with the current data.
	Close Form	Closes all windows of the current form.
	Cut	Cuts the current selection to the clipboard.
	Copy	Copies the current selection to the clipboard.
	Paste	Pastes from the clipboard into the current field.
	Clear Record	Erases the current record from the window.
	Delete	Deletes the current record from the database.
	Edit Field	Displays the Editor window for the current field.
	Zoom	Displays custom-defined Zoom (drilldown behavior).
	Attachments	Displays the Attachment window.
	Window Help	Displays help for the current window.

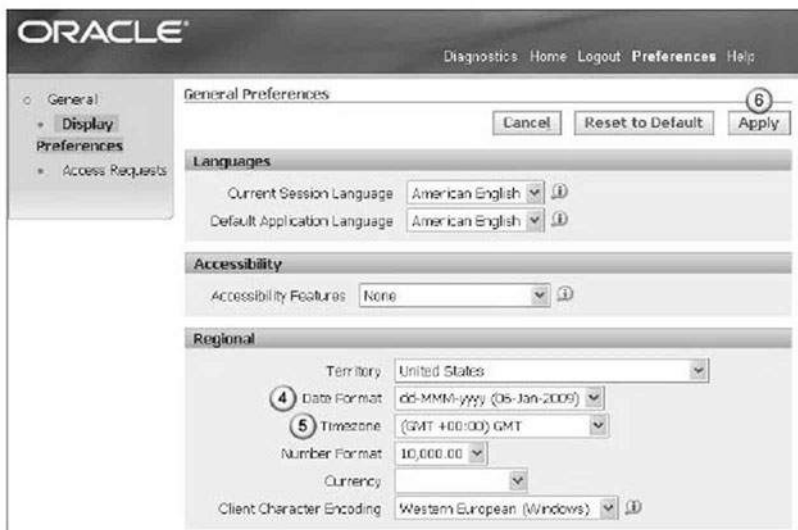
Figure 3.91 Training Manual Instructions

## Changing Preference Settings

1. Log in to the Oracle application.
2. In the Oracle Applications Home Page, click **Preferences**.



3. The **General Preferences** page is displayed.
4. **Date Format**: Change it to the desired format.
5. **Timezone**: Change it your time zone.
6. Click **Apply**.



7. Verify that the message **Confirmation. Updated successfully.** appears at the top of the screen.

Figure 3.92 Training Manual Group Activity

Financial Statement Review		Higher Up Increased	Lower Down Decreased
1	Are the YTD revenues for the location up or down when compared to prior year?	<input type="checkbox"/>	<input type="checkbox"/>
2	What revenue category has increased the most on a YTD basis when compared to prior year?	_____	
3	What revenue category has decreased the most on a YTD basis when compared to prior year?	_____	
4	Are the YTD Operating expenses up or down over last year?	<input type="checkbox"/>	<input type="checkbox"/>
5	Are the YTD SG&A expenses up or down over last year?	<input type="checkbox"/>	<input type="checkbox"/>
6	What category of Reconditioning revenue has had the greatest % change over prior year to date?	_____	
7	How many sale days did the location have in the most recent month?	_____	
8	What expense category (Operating or SG&A) has had the greatest percent change when compared to the prior year?	_____	
9	How many cars did the location register in most current month?	_____	
10	What was the average registration per sale in most current month?	_____	
11	How many cars did the location sell in most current month?	_____	
12	What was the location's sales ratio for most current month?	_____	
13	Was the location's sales ratio for current month higher or lower than the prior year?	<input type="checkbox"/>	<input type="checkbox"/>
14	Was the location's sales ratio for current month higher or lower than YTD for the prior year?	<input type="checkbox"/>	<input type="checkbox"/>

## TRIP REPORT

A **trip report** is usually a simple memo that is sent to a supervisor after an employee returns from a business trip.

A trip report should include (Figure 3.93):

- The purpose of the trip
- A summary of what happened on the trip
- A discussion of any information learned on the trip that needs to be considered, such as customer needs or complaints
- Recommendations for any action that needs to be taken

**Figure 3.93** Trip Report

**MEMORANDUM**

**To:** Jane Crosby, Sales Manager  
**From:** Dirk Johnson  
**Date:** July 11, 2012  
**Subject:** Oklahoma sales trip

*Purpose:* This is an update of my sales trip last week to Oklahoma City.

*Summary:* I called on four of our existing customers and three new potential customers. The existing customers (ABC, Dowd Electric, Pace Supplies, and Jumbo Construction) all seemed pleased with our service. The three new customers (Xcel, Jefferson Bingham, and Winstead) are mainly interested in pricing.

*Discussion:* Jeff Brown at Xcel showed me our competitor’s price list. Our prices are about 10% more. Jeff expressed interest in doing business with us if our prices were comparable. I believe the same would be true for Jefferson Bingham and Winstead.

*Recommendation:* I suggest we run some type of special sale or promotion for a specific period of time to get these guys to give us a try. Once they experience our level of service, if our prices increase later, they may not care.

## USER GUIDE

**User guides** are documents about the operation of a product. The types of user guides are:

- Large user guides, for complex products
- Software user guides, published as books, online as Web pages (Figure 3.94), or both ways
- Small user guides, written for products ranging from toasters to automobiles

Some user guides may include tutorials for learning to use the product. Product tutorials are often published as separate documents (Figure 3.95). User guides often include troubleshooting procedures.

User guides often include:

- Heading organization with subheadings
- Numbered and bulleted lists
- Step-by-step instructions
- Graphics and illustrations.
- Tables
- Use of boldface, italics, all caps, and different fonts to highlight content.
- Special notices with notes, tips, warnings, cautions, and danger messages

User guides also include covers (Figure 3.96), title pages, list of trademarks, disclaimers, warranties, license agreements, appendix items, glossaries, and an index.

The product-related content included in a user guide is usually presented in one of the following ways:

- Step-by-step instructions guide users through operating the product (Figure 3.97). These guides often contain:
  - Illustrations as a road map
  - Numbered lists or list bullets as formatting
- Reference information provides content about all of the components, settings, controls, and options (Figure 3.98). Reference information is often presented in table form.
- Getting-started information provides users with a tutorial on how to start using the product immediately (Figure 3.99).
- Technical specifications provide reference information for maintenance and troubleshooting.

(text continues on page 626)

Figure 3.94 Online User Guide

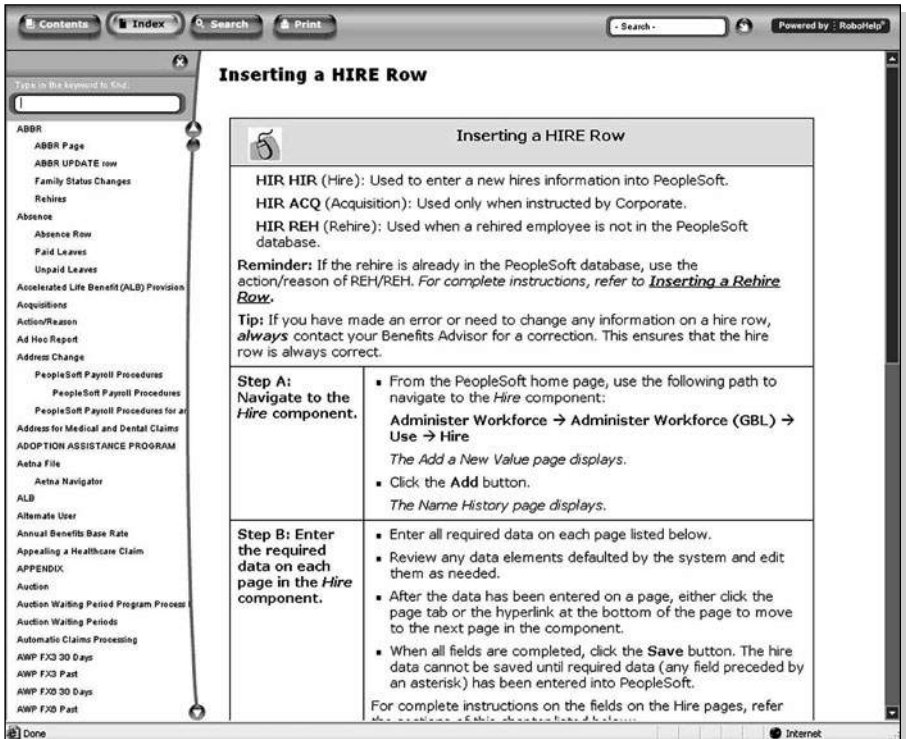




Figure 3.95 User Guide Tutorial

## Walkthrough – Rounding

In this walkthrough, you would use the ROUND, ROUNDUP, and ROUNDDOWN functions.



### Using the ROUND function

1. Open the Round Exercise.xls file.
2. In cell C2, enter the following formula: **=ROUNDUP(B2,0)**
3. In cell C4, enter the formula: **=ROUND(B4,-1)**
4. In cell C5, enter the formula: **=ROUNDDOWN(B5,0)**

	A	B	C
1			
2	Revenues	\$ 3,423,117.80	\$ 3,423,118.00
3			
4	Operating Expenses	\$ (1,295,371.21)	\$ (1,295,370.00)
5	SG&A Expenses	\$ (862,595.52)	\$ (862,595.00)
6			
7	IBD	\$ 1,265,151.07	
8	IBD %	36.96%	
9			
10	Average # of Dealers registered	423.62	



Note how the value in cell C2 is rounded up to the nearest whole dollar, while the value in cell C4 is rounded to the nearest whole number (because of the -1) in the formula. The value in cell C5 is also rounded down because of the ROUNDDOWN function.

5. Save your work by clicking **File > Save As**, and then changing the name of the file to **"Round Exercise A"** and then click the **Save** button.
6. Close the spreadsheet by clicking **File > Close**.

Figure 3.96 User Guide Cover



Figure 3.97 User Guide Instructions


PeopleSoft Basics	
<b>Changing Your Password</b>	
<p><b>Step 1: Navigate to the <i>Change Password</i> page.</b></p>	<ul style="list-style-type: none"> <li>▪ From the PeopleSoft home page, click the <b>Change My Password</b> link in the Main Menu.</li> </ul> <p><i>The Change Password page displays</i></p> <p><b>Note:</b> You can also change your password from the <i>General Profile Information</i> page.</p> <p><b>Change Password</b></p> <p>User ID: LBCTWO Description: LBC TWO</p> <p>*Current Password: <input type="text"/></p> <p>*New Password: <input type="text"/></p> <p>*Confirm Password: <input type="text"/></p> <p><input type="button" value="Change Password"/></p>
<p><b>Step 2: Change your password.</b></p>	<ul style="list-style-type: none"> <li>▪ Key your current password into the <b>Current Password</b> box.</li> <li>▪ Key your new password into the <b>New Password</b> box.</li> <li>▪ Key your new password again into the <b>Confirm Password</b> box.</li> <li>▪ Click the <b>Change Password</b> button.</li> </ul> <p>Your password is immediately changed in PeopleSoft and the Password Saved page displays.</p> <p><b>Password Saved</b></p> <p> Your password has successfully been changed.</p> <p><input type="button" value="OK"/></p> <ul style="list-style-type: none"> <li>▪ Click the <b>OK</b> button.</li> </ul>
<p><b>Password Rules to Remember:</b></p> <ul style="list-style-type: none"> <li>▪ Your User ID and Password cannot be the same.</li> <li>▪ Passwords must be a minimum of 7 letters and/or numbers or special characters. At least 2 of the 7 characters must be numbers.</li> <li>▪ The following characters can be used in your password: ! @ # \$ % ^ &amp; * ( ) _ - = + \   [ ] { } ; : / ? . &lt; &gt;</li> <li>▪ Passwords are case sensitive. PeopleSoft-generated passwords are all upper case. You can</li> </ul>	

Figure 3.98 User Guide Reference Information

### The Find an Existing Value Page

After navigating to a page or component, the *Find an Existing Value* page displays. This page allows you to input search criteria in order to access a specific employee's data. It is also used to determine the page mode.

The screenshot shows a web form titled "Job Data" with a sub-section "Find an Existing Value". The form contains several input fields, each with a dropdown menu for search criteria. Callouts on the left side of the image point to specific fields:

- Primary Search Field:** Points to the "EmpID:" field.
- Alternate Search Fields:** Points to a group of fields including "Empl Rcd Nbr:", "Name:", "Last Name:", "Second Name:", "Alternate Character Name:", "Middle Name:", "Department SetID:", "Department:", and "National ID:".
- Page Mode:** Points to the "Employee Status:" field and the checkboxes for "Include History" and "Case Sensitive".
- Search Results List:** Points to the table of search results below the form.

At the bottom of the form, there are buttons for "Search", "Clear", "Basic Search", and "Save Search Criteria".

**Search Results**  
View All

EmpID	Empl Rcd Nbr	Name	Last Name	Second Name	Alternate Character Name	Middle Name	Department SetID
00413771 0		Smith,Ryan H	SMITH	(blank)	(blank)	H	AUJCTN
00413772 0		Smith,Richard M	SMITH	(blank)	(blank)	M	AUJCTN
00413773 0		Smith,Phillip A	SMITH	(blank)	(blank)	A	AUJCTN
00413776 0		Smith,Alice B	SMITH	(blank)	(blank)	B	AUJCTN
00413777 0		Smith,Howard S	SMITH	(blank)	(blank)	S	AUJCTN
00413778 0		Smith,Patricia C	SMITH	(blank)	(blank)	C	AUJCTN

**Primary Search Field:** The primary search field is the first field on the *Find an Existing Value* page. The *EmpID* field is the primary search field for most records in PeopleSoft 8.9.

Figure 3.99 User Guide Quick Start

## Create a Class

### Option A. Creating a Class From the Classes Screen

When creating a new class, you have the option of creating it from an from an existing course. The new class inherit most of the data fields from the existing course. You then customize the fields with specific information about the new class.

- From the **Administration Center** navigation bar, click **CLASSES**

The **Classes** screen will display.

- From the **Options** list, select **New Class From...**



The **New Class From...** screen will display.

- Click the **AA** for the **Course** field.

The **Find Course** box will display.

 A screenshot of a 'Find Course' dialog box. The dialog has a title bar that says 'Find Course - Web Page Dialog'. It contains several input fields and checkboxes. At the top, there are 'From' and 'To' labels above two empty text boxes. Below that, there are 'Course Code' and 'Name' labels, each followed by an empty text box. In the middle, there are two 'Course Code' dropdown menus, each followed by 'From' and 'To' labels and empty text boxes. At the bottom, there are checkboxes for 'Active' and 'History', both of which are checked. Below the checkboxes is a 'Views' dropdown menu set to 'Class Open'. At the very bottom, there are four buttons: 'Find', 'Reset', 'Previous', and 'Cancel'.

- Enter the appropriate search criteria, such as the **Course Code** or **Name**. Use % as a wildcard or when entering partial names or course codes.

- Click the **Find** button.

Your search results will be displayed on the **Results** tab.

- Click the correct course from the list, and then click the **Select** button.

The class information will be displayed on the **Classes** screen.

- Update the fields as necessary.
- Enter the **Start Date** for the class.
- From the **Class Toolbar**, click

## WARNING LETTER

**Warning** or **discipline letters** are written to make an employee aware of a problem and to define potential disciplinary action. A warning letter becomes part of an employee's personnel file and may be used later during the termination process.

When writing a warning letter, consider these tips (Figure 3.100):

- Start the letter by stating briefly what events led to the written warning. Include specific situations, dates, and times.
- Identify your expectations for the employee and what behavior the employee needs to change.
- Warn the employee that disciplinary action may have to be taken if the behavior is not corrected.
  - Provide details about what the disciplinary action may include.
  - State that failure to correct the situation may result in termination.

Warning letters are typically written to:

- Document a reprimand.
- Warn an employee for breach of policy.
- Warn an employee for poor performance.
- Reprimand an employee for poor attendance or lateness.
- Warn tenants in a rental property.
- Warn customers about a credit suspension.

**Figure 3.100** Warning Letter

Credit Corp America  
4300 Interstate Parkway  
Dallas, TX 75301  
June 2, 2012

Mary Sullivan  
6426 Lakewood Blvd  
Dallas, TX 75214

Dear Mrs. Sullivan:

As you will recall, the sales quota for our customer representatives is \$10,000 per month. I discussed with you at the end of April that it was important for you to achieve this quota each and every month. For the month of May, your sales totaled only \$5,500.

Company policy states that any customer representative who fails to achieve his/her sales quota for two consecutive months is subject to termination. As a result of this situation, this letter will serve as a warning, and a copy will be placed in your personnel file. To avoid termination, you will need to achieve your quota for the month of June.

If you know of any problems that will prevent you from reaching these goals, or if you wish to discuss this matter with me in more detail, please arrange for a meeting.

Yours,

*Mary Ann Lemer*  
Mary Ann Lemer  
Vice President of Sales

## WEB SITES

Writing for a **Web site** is different from writing for print.

- Writing for print is linear in nature, whereas writing for the Web is nonlinear.
- Web page content is usually chunked and packaged, so that a reader can quickly scan the page and decide whether to read more. (Readers spend very little time reading text on an individual Web page.)
- Web pages feature highlighted keywords, extensive use of subheadings, bulleted lists, and normally half the word length of a similar paper document.

When writing content for a Web site, consider these tips (Figure 3.101):

- Tone down promotional marketing hype and focus instead on reference and helpful information.
- Use an objective rather than a subjective tone.
- Use the active voice for Web content.
- Show numbers as numerals in all Web content.
  - Numerals are easier to scan and take up less room.
- Spell out large numbers, such as a million, billion, and trillion, because the words are shorter than the numerals.

When writing headlines for Web articles:

- Keep headlines short and format them in bold.
- Summarize the article so that users will know enough to determine whether they want to read it.
- Include the most important keywords first in the headline because readers often scan only the first few words of a headline.
  - Use keywords that match common user search criteria in search engines.
- Substitute commonly known words for technical jargon.
- Use generic names rather than brand names.



- Make the average headline five words.

When writing a Web article, consider the following:

- Use the inverted pyramid approach that is often used by journalists where you begin the article by telling the reader the conclusion, followed by important supporting information, and then end by providing background details.
- Use down-to-earth informal language to make the content easy to understand.
- Include hyperlinks to reference sources for added credibility.
- Use humor with caution because of the wide variety of user preferences.
- Use approximately 60% fewer words than you would if you were writing the same content for print.
- Chunk the content into sections and move nice-to-know content to other pages, and include hyperlinks to this content in the main article.
- Illustrations should always have a caption and complement the text rather than used just to make the page flashy.
- Segment the text to make it easier to scan the document.
  - Break up long paragraphs into smaller segments.
  - Include a heading that describes the subject of each segment, and capitalize the first letter of each word.
  - Include subheadings where appropriate, and capitalize only the first word.
- For lists of any kind, use bullet lists.
- Use the three aspects of rhetoric: ethos, pathos, and logos.
  - Ethos—Establish the credibility of the author by including references and hyperlinks to your sources.
  - Pathos—Make an appeal to the reader’s emotions by writing from the reader’s point of view.
  - Logos—Appeal to the reader’s logic by providing statistical facts and convincing examples

Figure 3.101 Web Site

**isha**  
*Yoga of the Divine*

"I want you to know the power, the liberation of another kind of science - the inner science, the yogic science - through which you can become the master of your own destiny."  
- Sadhguru

**Patanjali - The Father of Yogic Sciences**

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Founder, Isha Foundation  
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*Initiatives*

**Health** **Education** **Environment**

**Action for Rural Regeneration** is a multi-phased, multi-phase, holistic swachh program whose primary objective is to improve the overall health and quality of life of the rural poor. [more ->](#)

**Isha Vidya**, an Isha Education initiative, is committed to raise the level of education and literacy in rural India and help disadvantaged children realize their full potential. [more ->](#)

**Project Green Hands** was launched to raise environmental awareness and to increase the green cover of the state of Tamil Nadu, by 10 percent by planting 11.6 million saplings. [more ->](#)

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## WHITE PAPERS

**White papers** are written to introduce an innovative product or technology to the industry, emphasize the unique qualities and advantages of a product or service, help influence customer buying decisions, and are the beginning steps in the creation of a product marketing strategy.

When preparing to write a white paper, read other white papers available on the Internet and look for successful models. Consider how the white paper will be published: paper-based or on a Web site.

When writing a white paper (Figure 3.102):

- Define the audience and understand their concerns.
- Be aware of the time investment required by the audience to read your white paper.
  - Make sure it is engaging and captures the audience's attention.
- Start with a one-paragraph executive summary with the key points the audience needs to know.
- State the problem faced by the customer that the product or service can solve.
- Describe the product and include the following details:
  - How the product was designed
  - What industry standards were used or considered
  - What type of testing was conducted on the product or service
  - What best practices were learned
- Keep a positive tone.
- Use the active voice.
- Avoid jargon and keep the presentation as nontechnical as possible.
- Include diagrams and illustrations.
- Explain how the product resolves the problem stated earlier.

- Tie the product to the problem, and include case study evidence of how the product solved the problem.
- Include testimonials and interview quotes, if available.
- Conclude by summarizing the benefits and discussing the return on investment for customers.
- Mention future product development and timelines for release.

**Figure 3.102** White Paper

## **PUTTING CITIZENS FIRST: Transforming Online Government**

*A White Paper Written for the Presidential Transition Team by  
The Federal Web Managers Council*

*Current and former members of the Federal Web Managers Council who contributed to this paper: Bev Godwin, General Services Administration/USA.gov (Executive Sponsor); Sheila Campbell, General Services Administration/USA.gov (co-chair); Rachel Flagg, Dept. of Housing and Urban Development (co-chair); Melissa Allen, Dept. of Interior; Andy Bailey, Dept. of Labor; Les Benito, Dept. of Defense; Joyce Bounds, Dept. of Veterans Affairs; Nicole Burton, General Services Administration/USA.gov; Bruce Carter, Social Security Administration (retired); Natalie Davidson, General Services Administration/USA.gov; Kate Donohue, Dept. of Treasury; Brian Dunbar, NASA; Tim Evans, Social Security Administration; Kellie Feeney, Dept. of Transportation; Sam Gallagher, Dept. of Housing and Urban Development; Colleen Hope, Dept. of State; Ron Jones, Dept. of Commerce/NOAA; Tina Kelley; Dept. of Justice; Gwynne Kostin, Dept. of Homeland Security; Jeffrey Levy, EPA; Beth Martin, Dept. of Health and Human Services; Leilani Martinez, GSA/GobiernoUSA.gov; Suzanne Nawrot, Dept. of Energy; Russell O'Neill, General Services Administration/USA.gov; Tom Parisi, Dept. of Treasury/IRS; Vic Powell, USDA; Rezaur Rahman, Advisory Council on Historic Preservation; Eric Ramoth, Dept. of Housing and Urban Development; Rand Ruggieri, Dept. of Commerce; Richard Stapleton, Dept. of Health and Human Services; Kim Taylor, USDA; Kirk Winters, Dept. of Education*

We welcome your questions and comments. Please contact the Federal Web Managers Council co-chairs, Sheila Campbell (Sheila.campbell@gsa.gov) and Rachel Flagg (Rachel.flagg@hud.gov).

**Introduction**

This White Paper recommends specific strategies for revolutionizing how the U.S. Government delivers online services to the American people. It was developed by the Federal Web Managers Council, comprised of Cabinet agency Web Directors.

**The current state of government online communications**

The importance of the Internet has grown exponentially over the last decade, but the government's ability to provide online services to the American people hasn't grown at the same pace. Building this capacity will present one of the biggest challenges—and most promising opportunities—for President-elect Obama. We need to build on the groundswell of citizen participation in the presidential campaign and make people's everyday interactions with their government easier and more transparent.

It won't be an easy task. There are approximately 24,000 U.S. Government websites now online (but no one knows the exact number). Many websites tout organizational achievements instead of effectively delivering basic information and services. Many web managers don't have access to social media tools because of legal, security, privacy, and internal policy concerns. Many agencies focus more on technology and website infrastructure than improving content and service delivery. Technology should not drive our business decisions, but rather help us serve the needs of the American people. Here's the result when communication takes a backseat to technology:

“Often I can find the page on a government site that's supposed to contain the information I need, but I can't make heads or tails of it. I recently tried to Google a specific requirement for dependent care flex accounts. Although I got to the correct page, it didn't answer my question. The links took me to the typical, poorly written tax guidance. Where did I get the answer to my question? On Wikipedia.”

We're working to address these problems. We've built a network of over 1,500 federal, state, and local web professionals across the country to share best practices; we created a large-scale training program for web managers; and we're working to support the use of social media while also addressing important privacy, security, and legal implications.

While our efforts have been very successful, a high-level mandate from the new Administration is needed to quickly and radically transform government websites.

**A bold, new vision for the future**

President-elect Obama should be able to promise the American people that when they need government information and services online, they will be able to:

*(continues)*

**Figure 3.102** (continued)

- Easily find relevant, accurate, and up-to-date information;
- Understand information the first time they read it;
- Complete common tasks efficiently;
- Get the same answer whether they use the web, phone, email, live chat, read a brochure, or visit in-person;
- Provide feedback and ideas and hear what the government will do with them;
- Access critical information if they have a disability or aren't proficient in English.

The recommendations below are designed to help the new Administration increase the efficiency, transparency, accountability, and participation between government and the American people. Some of these changes can be implemented quickly and at minimal cost. Others will require significant changes in how agencies conduct business and may require shifts in how they fund web communications.

**Establish Web Communications as a core government business function**

One of the biggest problems we face in improving government websites is that many agencies still view their website as an IT project rather than as a core business function. Many government websites lack a dedicated budget. Only a minority of agencies have developed strong web policies and management controls. Some have hundreds of “legacy” websites with outdated or irrelevant content. With limited resources, many find it difficult to solicit regular customer input and take quick action to improve their sites. While there are many effective government websites, most web teams are struggling to manage the amount of online content the government produces every day.

- Agencies should be required to fund their “virtual” office space as part of their critical infrastructure, in the same way they fund their “bricks and mortar” office space.
- Agencies should be required to appoint an editor-in-chief for every website they maintain, as do the top commercial websites. This person should be given appropriate funding and authority to develop and enforce web policies and publishing standards, including ensuring that prime real estate on government websites is dedicated to helping people find the information they need.
- OPM should develop standard job descriptions and core training requirements so agencies can hire and retain highly qualified experts in web content and new media—not just IT specialists.

**Help the public complete common government tasks efficiently**

The U.S. economy loses millions of hours of “citizen productivity” every year when people can’t efficiently accomplish basic government tasks online, such as filling out a form, applying for a loan, or checking eligibility for a government program. This adds to people’s dissatisfaction with their government.

- Agencies should be required and funded to identify their core online customer tasks, and to develop service standards and performance benchmarks for completing those tasks. If the core customer tasks are not yet online, agencies should determine whether or not those tasks can be made available online, and if so, develop a plan for making them available online within one year.
- The Government should use social media, not just to create transparency, but also to help people accomplish their core tasks. For example, agencies could post instructional videos on YouTube to explain how to apply for a small business loan or learn about Medicare benefits. To do this, the government must ensure that federal employees who need access to social media tools have them, and that these new ways of delivering content are available to all, including people with disabilities.
- The new Administration should develop government-wide guidelines for disseminating content in universally accessible formats (data formats, news feeds, mobile, video, podcasts, etc.), and on non-government sites such as YouTube, Wikipedia, and SecondLife. To remain relevant, government needs to take our content to where people already are on the Web, rather than just expecting people will come to government websites. Having guidelines will ensure that we’re part of the larger “online information ecosystem,” without compromising the integrity of government information.

**Clean up the clutter so people can find what they need online**

President-elect Obama will inherit thousands of U.S. government websites. We have too much content to categorize, search, and manage effectively, and there is no comprehensive system for removing or archiving old or underused content. Some agencies have posted competing websites on similar topics, creating duplication of effort and causing confusion for the public. Much government web content is written in “governmentese” instead of plain language.

- The Government should set stricter standards for approving new, or renewing existing, government websites. All federally owned, managed, and/or directly funded websites must be hosted on .gov, .mil or fed.us domains. Where agency missions are related, a lead agency should be appointed to coordinate the online

*(continues)*

**Figure 3.102** (continued)

“information lane,” and all other agencies should defer to the lead agency for posting comprehensive government information on that topic. This will reduce duplication, save money, and help consumers find accurate information.

- Agencies should be required and funded to conduct regular content reviews, to ensure their online content is accurate, relevant, mission-related, and written in plain language. They should have a process for archiving content that is no longer in frequent use and no longer required on the website.
- Agencies should be funded and required to follow the latest best practices in web search. This will improve the quality and findability of online government information, and help agencies deliver the services most requested by their customers.

**Engage the public in a dialogue to improve our customer service**

Agencies often don't have resources to effectively manage customer input. For those that do, they must go through a clearance process before they can survey the public (requirements of the Paperwork Reduction Act, which was enacted before many agencies even had websites). Many web pages are developed without regular feedback or testing with customers. When people do provide feedback or ideas, they often never hear what the government will do with their suggestions.

- Agencies should be required and funded to regularly solicit public opinion and analyze customers' online preferences—just as Amazon, eBay, and other top commercial websites do. This can be done on an “opt-in” basis and without tracking personally identifiable information by using blogs, online surveys, a “Citizens Insight Panel” (such as that used by the Canadian government), or similar tools. Agencies should be required and funded to do user testing before undertaking major improvements to any current website, or launching a new website.
- Agencies should use their website to publish a summary of common customer comments and explain the actions they are taking in response to the feedback. Doing so will create better transparency and accountability.

**Ensure the public gets the same answer whether they use the web, phone, email, print, or visit in-person**

Agencies communicate with citizens via many different “delivery channels,” including web, email, publications, live chats, blogs, podcasts, videos, wikis, virtual online worlds, and more. But it's difficult to ensure timeliness and consistency when various delivery channels are managed by different divisions within an agency.



- Agencies should provide multiple ways for people to contact them and ensure that information is consistent across all channels. They should be funded to coordinate all types of content targeted to the general public (web, publications, call center, email, common questions, web chat, etc.). Agencies should be rewarded for delivering consistent information, both within agencies and across government.

### **Ensure underserved populations can access critical information online**

Agencies are required to provide online information that's readily accessible by people with disabilities, as well as to people with limited English proficiency. However, few agencies have the funding, training or resources to meet these obligations.

- The government should establish standards and guidelines for multilingual websites, and agencies should be funded and staffed with qualified bilingual web content professionals who can create and maintain them. This will help newcomers learn about the rights and responsibilities of living in the U.S.
- Agencies should receive adequate resources to make their websites fully accessible to people with disabilities and meet requirements of the Rehabilitation Act. The new Administration should invest in government-wide solutions, such as captioning software to make videos and webcasts accessible to people with disabilities.

### **Conclusion**

By harnessing the collaborative nature of the web, the new Administration has the potential to engage the public like never before. The web can foster better communication and allow people to participate in improving the operations of their government. By listening to our customers we can provide better services, focus on their most pressing needs, and spend their tax dollars efficiently. We're confident that President-elect Obama will appoint leaders who will invest in the web as a strategic asset and make these goals a reality. The millions of Americans who interact with their government online expect and deserve no less.