U.S. Fish and Wildlife Service Correspondence Manual 2011

Chapter 11: Examples

Please Refer to DTS Record: 046313 to download or to review examples.

Chapter 12: Reference Materials and Other Information That is Handy to Have

Please Refer to DTS Record 046313 to download or review additional materials.

Foreword

About Plain Language

Our Government does most of its day-to-day business through written communications. We want to ensure our message is clear, concise, and easy to understand. Service Manual Chapter 116 FW 1, Plain Language in Fish and Wildlife Service Documents, explains our requirements for using plain language and will help you to prepare correspondence that your readers will understand. Plain language is more than just using simple words and a question and answer format—it is about organizing writing so readers understand it the first time they read it. A few of the techniques for writing plain language include:

- Organizing your thoughts before you begin writing
- Preferring active voice over passive voice
- Keeping sentences short (aim for no more than 20 words)
- Using few or no acronyms
- Omitting needless words
- Developing tables, charts, and figures to explain complex ideas
- Using bullets for lists

Another good source for information about language is the Federal Government's Plain Language Web site (www.plainlanguage.gov). On that site, you will find practical examples, word suggestions, before and after comparisons, lists of reference books and other resources.

This Handbook

To be an effective means of communication, correspondence must meet certain standards of appearance and style. This Handbook describes the U.S. Fish and Wildlife's (Service) standards and will help us prepare better correspondence.

By combining the principles of plain language with the guidelines in Service Manual Chapter 282 FW 2, Managing Correspondence and Official Documents, your correspondence will:

- Meet the Department of the Interior and Service requirements
- Clearly state our message
- Follow a consistent format

After writing your correspondence, using our Data Tracking System (DTS) to move documents through the surname chain in a timely manner is another essential element to ensuring Service employees continue to be effective communicators.

Washington Office Building Locations

MIB – Main Interior Building   **ARLQ-Arlington Square**
                                                                       Mailing Address for All
                                                                        Arlington Offices

U.S. Fish and Wildlife Service   U.S. Fish and Wildlife Service
1849 C Street NW   4401 N. Fairfax Drive
Mail Stop 3331   Mail Stop 4401
Washington, D.C. 20240   Arlington, VA 22203

Regional Office Building Locations and Mailing Addresses

Region 1 – Portland, Oregon
Pacific Region
911 NE 11th Avenue
Portland, Oregon 97232
(Hawaii, Idaho, Oregon, Washington State, and the Pacific Islands)

Region 2 – Albuquerque, New Mexico
Southwest Region
500 Gold Avenue SW
Albuquerque, NM 87102
(Arizona, New Mexico, Texas, Oklahoma)

Mailing Address
P.O. Box 1306
Albuquerque, NM 87103

Region 3 – Ft. Snelling, Minnesota
Midwest Region
One Federal Drive
Fort Snelling, MN 5511
(Illinois, Indiana, Ohio, Michigan, Minnesota, Missouri, Wisconsin, Iowa)

Region 4 – Atlanta, Georgia
Southeast Region
1875 Century Boulevard, NE, Suite 400
Atlanta, GA 30345
(Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee, Puerto Rico, Virgin Islands)

Region 5 – Hadley Massachusetts
Northeast Region
300 Westgate Center Drive
Hadley, MA 01035
(Connecticut, Delaware, Washington D.C., Maine, Maryland, New Hampshire, New Jersey, Massachusetts, New York, Pennsylvania, Rhode Island, Vermont, Virginia, West Virginia)

Region 6 – Denver Colorado
Mountain-Prairie Region
134 Union Boulevard
Lakewood, CO 80228
(Colorado, Kansas, Montana, Nebraska, North Dakota, South Dakota, Utah, Wyoming)

Mailing Address
P.O. Box 25486 DFC
Denver, CO 80225

Region 7 – Anchorage Alaska
Alaska
1011 East Tudor Road
Anchorage, AK 99503
(Alaska)

Region 8 – Sacramento, California
Pacific Southwest Region
2800 Cottage Way, Suite W-2606
Sacramento, CA 95825
(California, Nevada, Klamath Basin)

LIST OF COMMONLY USED ACRONYMS

- A/S Assistant Secretary (nonspecific)
- ABHC Assistant Director - Budget, Planning and Human Capitol
- ABMO Assistant Director - Business Management and Operations
- AEA Assistant Director - External Affairs
- AES Assistant Director - Endangered Species
- AFHC Assistant Director - Fisheries and Habitat Conservation
- AIA Assistant Director - International Affairs
- AIRT Assistant Director - Information Resources & Technology Management
- AMB Assistant Director - Migratory Birds
- ANRS Assistant Director - National Wildlife Refuge System
- AWSR Assistant Director - Wildlife and Sport Fish Restoration
- BIA Bureau of Indian Affairs
- CCU Correspondence Control Unit
- CLE Chief - Office of Law Enforcement
- D Director
- D-SA Special Assistant to the Director
- DD Deputy Director
- DD-SA Special Assistant to the Deputy Director
- DTS Data Tracking System
- DS Deputy Secretary
- ES, ExecSec, or OES Executive Secretariat
- FNP or NPS National Park Service
- FW or FWP Assistant Secretary for Fish and Wildlife and Parks
- FWS Fish and Wildlife Service
- IA Assistant Secretary - Indian Affairs
- LLM or BLM Bureau of Land Management
- LM Assistant Secretary - Land and Minerals Management
- NCTC National Conservation Training Center
- NFWF National Fish and Wildlife Foundation
- OCL or CL Office of Congressional and Legislative Affairs
- OIG Office of Inspector General
- PMB Assistant Secretary - Policy, Management and Budget
- PPA Office of Policy Analysis
- PPM Office of Personnel Policy
- R1-8 or RD1-8 Regional Directors, Regions 1 to 8
- S Secretary of the Department of the Interior
- SOL Solicitor
- WBR, BOR, or BuRec Bureau of Reclamation
- WGS or USGS U.S. Geological Survey
- WS Assistant Secretary - Water and Science

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<u>Chapter 1</u>

<u>Purpose and Responsibilities</u>

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1.1 Purpose

This handbook prescribes procedures and standard formats for preparing correspondence. It supersedes all previous Service guidance on correspondence. This handbook is intended for Washington office employees and it is not meant to change established Regional correspondence procedures, but rather give the Regions a guide as to how correspondence should be sent to the Washington office.

1.2 Applicability

This handbook includes requirements for preparing and processing letters and memoranda developed for the Secretary, Assistant Secretary for Fish and Wildlife and Parks, other officials of the Department, and Service Director to sign.

1.3 Objectives

Our objectives are to:

- Provide clear instructions and uniform guidance for preparing correspondence,
- Improve timeliness and quality of correspondence, and
- Reduce paper waste.

1.4 Responsibilities

<u>The Correspondence Control Unit (CCU):</u>

- Receives and assigns all significant correspondence addressed to the Director, Assistant Secretary for Fish and Wildlife and Parks, and the Executive Secretariat (ExSec).
- Ensures that all information entered into DTS shows the office to which the action is assigned, due dates, and signature level; that incoming correspondence is uploaded; and that records are assigned to the appropriate office for action.
- Obtains all required Departmental surnames as necessary.
- Ensures due dates are met.
- Properly uploads documents that are signed by the Director, Assistant Secretary for Fish and Wildlife and Parks, and the Secretary.

Assistant and Regional Directors (Executive Assistants/Secretaries/Admin Staff):

- Ensure correspondence is responsive, accurate, written in plain language, grammatically correct, and free of typographical errors.
- Ensure staff meet due dates.
- Upload draft documents and supporting attachments into DTS.
- Use the tools available in DTS, including routing, versioning, closing files, and surnaming.

> ## Chapter 2
>
> ## Procedures for Preparing Controlled Correspondence

2.1 General Guidelines

This chapter describes how to prepare "controlled" correspondence for the signature of the Director, Assistant Secretary, and Secretary.

2.2 Definition of Controlled Correspondence

 "Controlled" correspondence is correspondence tracked from the time it is assigned until it is finalized (signed, mailed, etc.).

2.3 Reference Materials

In addition to this handbook, there are many resources you can reference when preparing correspondence:

- Secretarial Correspondence Bulletins
- U.S. Government Correspondence Manual, 1992
- Government Printing Office Style Manual
- 116 FW 1, Plain Language in Service Documents
- 282 FW, Managing Correspondence and other Official Documents

2.4 Language Requirements

Keep acronyms to a minimum. When using an acronym, spell it out the first time you use it and put the acronym in parenthesis.

Spell out Department of the Interior and then refer to it as the Department (not "DOI"). Spell out U.S. Fish and Wildlife Service then refer to it as the Service (not "FWS").

Avoid using statements such as "I have reviewed" or "I know" that make the official signing the correspondence personally responsible for a level of detail not appropriate for his/her office.

Do not use contractions.

2.4.1 Language in the letter, use:

I" and "me" for letters prepared for the Secretary's signature.
"We" and "us" for letters prepared for the Assistant Secretary's signature.
"The Service" and "we" for letters prepared for the Director and Assistant and RegionalDirectors.

Region and Regional office are always capitalized when referring to Service Regions. Refer to the Government Correspondence Manual 1992 for complete guidance on capitalization.

2.5 Best Tips for Writing Effective Letters

1st draft should be content oriented.
2nd draft should narrow the scope.
3rd draft incorporates appropriate grammar.

2.6 Style

Write correspondence in a clear, direct style. Keep the opening paragraph short and to the point. Use courteous, positive language to establish rapport with the addressee. When applicable, include the date of the incoming correspondence in the opening sentence.

The Department prefers the following standard opening sentence:

"Thank you for your letter of (date) (concerning, about, requesting, supporting, opposing, providing, etc.) _____."

DO NOT USE: "This is in response to" or "This responds to." Avoid using phrases like "As you probably know" or "As you are aware."

If the incoming is addressed to someone other than the person signing the response, you can explain this in the opening paragraph:

"Thank you for your letter of (date) to Secretary of the Interior (Name) about (issue). Secretary (name) has asked that we respond directly to your ….." - several variations are appropriate.

2.7 Multiple Signatures

When more than one person signs an incoming letter, send an identical response to each person who signed the incoming letter. Mention in the letter that you are sending a response to all of the people who signed it.

Appropriate phrasing is:

For three or fewer signatories:

"Thank you for letter of January 2, 2010, also signed by (name(s)), about…"

For more than three signatories:

"Thank you for your letter of January 2, 2010, cosigned by 50 of your colleagues…"

If the response is late, the following response(s) is appropriate:

"Thank you for your letter of January, 2, 2010, about (issue). We apologize for the delay."

"Please accept our apology for the delay in responding."

The closing sentence of a letter transitions from the main body to the complimentary close. An offer to provide additional information or assistance is a good transition. Provide the appropriate contact name and phone number.

"If we can be of further assistance, please feel to contact me or (name, title) at (phone number)."

2.8 Appropriate Contacts

If the Secretary (or Deputy Secretary or any other Department designee) is signing the letter, the Assistant Secretary of Fish and Wildlife and Parks or the Director is the appropriate contact (depending on the issue).

If the Assistant Secretary is signing the letter, the Director is the appropriate contact.

If the Director is signing the letter, the program Assistant Director or the appropriate Regional Director is the contact.

If the program Assistant Director or the Regional Director is signing the letter, the appropriate contact may be anyone the AD/RD designates.

2.9 Stationery

Signature Level	Letterhead	Envelope
Director	U.S. Fish and Wildlife Service	Service
Assistant Director	U.S. Fish and Wildlife Service	Service
Regional Director	Regional FWS	Service
Assistant Secretary	Office of the Secretary	Office of the Secretary
Associate Deputy Secretary	Associate Deputy Secretary	Office of the Secretary
Deputy Secretary	Office of the Deputy Secretary	Office of the Secretary
Secretary	Secretary of the Interior	Secretary of the Interior

Print continuation pages on plain white paper.

Always print drafts on yellow paper; however, print drafts written for Departmental signatures on their "ladder letterhead."

To reduce paper waste, do not print correspondence requiring the signature of the Service Director or higher on letterhead. CCU will print the final draft on letterhead after ensuring surnames are complete and no revisions are necessary.

2.10 Margins

- Left, right, bottom margins: Allow at least 1 inch

- Top margin on the second page: Allow at least 1 inch.

- For short letters, adjust margins to frame the document on the page.

- Do not justify the right margin.

2.11 Font, Dates, and References

Use Times New Roman in 12 point. You may use an 11-point font to limit the letter to one page (and save on paper waste).

Date: Do not type in a date. It will be inserted after signature.

Reference Block: For correspondence that an official in the Service will sign, immediately below the Departmental seal, flush with the left margin, type the following:

In Reply Refer To:	In Reply Refer To:	In Reply Refer To:
FWS/AFHC/012345	FWS/R6/AES/12345	FWS/R5/12345

The number at the end is the DTS record number. DTS generates the number when you enter the record.

You may use a font as small as 8 points for the reference block if it limits the correspondence to one page.

2.12 Addresses and Salutations

Type the inside address flush with the left margin, at least 2 lines below the "refer to" line, but no more than 5 lines below. The number of lines varies between the reference block and the addressee in order to frame the letter on a page.

Do not use more than 5 lines for the address, and no line should be longer than 4 inches. Use the name, title, organization, city, State, and zip code. To save space, you can omit the street address or P.O. Box on the letter, but make sure it is on the envelope. The zip code is typed 2 spaces after the name of the State. Spell out the State on the letter, but you may abbreviate it on the envelope.

2.13 Acceptable Address Examples

Mr. John E. Doe
President
U.S. Sportsmen's Alliance
1234 State Street
Any town, State 12345

On the letterhead do not use any abbreviations in the address block except for the following: D.C., St., Ste, Mr., Mrs., Ms., Dr., Jr., Sr., 2nd. II, III, NE, NW, SE, SW. Always spell out Avenue and Boulevard as part of the address on letterhead (you may abbreviate them on the envelope). You may also use P.O. Box instead of spelling out Post Office Box.

2.14 Appropriate Examples of Addresses and Salutations

Address	Salutation
Mr. John S. Doe General Manager, Valley Center Municipal Water District P.O. Box 1234 Valley Center, California 12345	Dear Mr. Doe:
The Honorable John P. Smith United States Senate Washington, D.C. 20510	Dear Senator Smith:
The Honorable Jane E. Doe House of Representatives Washington, D.C. 20515	Dear Ms. Doe: Dear Representative Doe:
The Honorable John P. Smith United States Senator Local Address Here Dallas, Texas 12345	Dear Senator Smith:
The Honorable Jane E. Doe Member, United States House of Representatives Local Address Here Dallas, Texas 12345	Dear Ms. Doe: Dear Representative Doe:
The Honorable John Doe Chairman, Committee on (name) United States Senate Washington D.C. 20510	Dear Chairman/Chairwoman (Surname):

The Honorable Jane Doe   Dear Representative/Senator:
Chairman, Subcommittee on (name)
  (name of Parent Committee)
House of Representatives
Washington, D.C. 20515

The Honorable John Smith   Dear Mr./Madam Secretary:
Secretary of (Department)
Washington, D.C. (zip)

Please refer to the U.S. Government Correspondence Manual 1992, for a complete list of addressees and salutations. Use the formal salutation—do not use first names. Use a colon after names.

2.15 Body

Begin the text of the letter two lines below the salutation, flush with the left margin.

Begin each paragraph flush with the left margin; indent subparagraphs ½ inch.

Single space all letters, regardless of length.

Double space between paragraphs; use two spaces between the end of one sentence and the beginning of the next to create a visual break between sentences.

2.16 Succeeding Pages

All correspondence should be concise and limited to one page if possible. If you need a second or more pages, you must carry over at least two full lines of text to the additional page, not including the closing line and the signature block.

The addressee's name should begin approximately 1 inch from the top of the margin, flush to the left and include the title and full name of addressee. The page number should be flush to the right.

The Honorable John H. Smith   2
Mr. Dale Jarrett   2

Continue the text two lines below the addressee name.

2.17 Complimentary Close

Type "Sincerely," two lines below the last paragraph/text and to the right of center. (Use "Respectfully" for letters addressed to the President.)

                                        Sincerely,

2.18 Signature Block

Type the signature block on the 4th or 5th line below the complimentary close.

Signature Level	Use this Signature Block
Director	DIRECTOR
Assistant Secretary FWP	Assistant Secretary for Fish and Wildlife and Parks Current A/SFWP requests: Thomas L. Strickland Assistant Secretary for Fish and Wildlife and Parks
Deputy Secretary	(Name)
Secretary	(Name) Ken Salazar

2.19 Attachments or Enclosures

Type the enclosure or attachment notation two spaces below the signature block, flush with the left margin. Be sure to describe the enclosures in the body of the letter.

2.20 Courtesy Copies (cc:)

Type cc: lines two spaces below the signature block or two spaces below the attachment or enclosure blocks. You may type this block on a second page.

Chapter 3
Correspondence and DTS

3.1 Congressional Correspondence Assigned By ExSec Office

ExSec assigns the correspondence to CCU. CCU assigns it to the appropriate Regional or program office and assigns the appropriate task by signature level.

If the task assigned is (0) Prepare Draft Response, the responsible office will prepare a draft response, upload the response into DTS prior to due date, and assign the record back to CCU. CCU will then ensure the proper surnames are received, including, as appropriate, the Department's Office of Congressional and Legislative Affairs (OCL).

3.2 Packaging Congressional Correspondence Assigned by ExSec Office

If the Regional office is tasked (0) Prepare Draft Response, the Region is responsible for drafting the response, obtaining appropriate Regional surnames, and assigning the DTS record back to CCU. CCU will then obtain all Washington office surnames and package the file for signature.

If the Washington program office is tasked (0) Prepare Draft Response, the Washington program office is responsible for drafting the response, obtaining appropriate surnames within their program, packaging the file in hard copy, and sending it to CCU. CCU will then ensure that any additional Washington office surnames are obtained.

3.3 Required Surnames

For the Regions:

- Regional office that prepared the reply
- Regional External Affairs CLA office
- Regional Director
- CCU
- AEA-CLA
- AEA
- Appropriate program office
- CCU
- Director
- Any additional surnames requested by ExSec office

For Washington Office:

- Office that prepared the reply
- CCU
- AEA-CLA
- AEA
- Additional program office(s) if necessary
- Director
- Any additional surnames requested by ExSec office

3.4 Uploading Signed Copies into DTS

CCU will finalize all ExSec Congressional assignments in DTS. CCU will ensure that the final signed copies are uploaded in DTS, the original letters are forwarded to AEA-CLA, and the appropriate action is taken to ensure final close out.

3.5 Congressional Correspondence Assigned by CCU

For the Regions:

For DTS assignments assigned to Regions with (0) Prepare Draft Response, follow the same instructions as assignments from ExSec.

For DTS assignments assigned to the Regions with (1) Prepare Reply, the Regions will prepare a draft, obtain the necessary surnames, and prepare the document for the Regional Director or designee to sign. Once signed, the Region will upload the signed copy into DTS and route it back to CCU so CCU can close out the record.

The Regional office is responsible for mailing correspondence signed by the Regional Director.

For the Washington Office:

All congressional correspondence that is incoming to the Service in the Washington office or in Arlington MUST be sent to CCU . This includes all congressional letters that are faxed, e-mailed, or sent directly to anyone in Washington, D.C. or Arlington.

CCU will analyze the congressional letter(s), determine the appropriate response/signature level, and assign it to the appropriate office through DTS.

If the appropriate response is to write a letter and have the Assistant Director or someone below that level sign it, you must coordinate it and have it surnamed by AEA-CLA and CCU before you finalize it and have the AD or other official sign it.

If the appropriate response is to write a letter and have the Director or someone at a higher level sign it, you must coordinate the correspondence and have it surnamed by

AEA-CLA, AEA-DAEA, AEA, the AD for the responsible program drafting the letter, and CCU before you give the letter to the Director for surname or signature.

Some Congressional correspondence may require a response by e-mail or telephone, or no action at all. In these cases, upload the e-mail into DTS or summarize and date the telephone call and upload it into DTS. Then notify CCU so they can close out the record. (Normally when this happens, you have already coordinated with AEA-CLA and CCU.)

Once the Congressional correspondence has been signed by the appropriate office, please send the original signed copy to CCU. CCU closes out the DTS record, which includes scanning signed documents and ensuring the enclosures/attachments (if applicable) are available. CCU will mail all congressional letters originating or signed in the Washington office to ensure they are properly closed out in DTS.

Note

All congressional correspondence signed in the Regions must have the Regional AEA-CLA surname. Congressional correspondence signed by the Assistant Directors, Director, and higher must be surnamed by AEA-CLA in Washington.

We encourage Regional offices to use the surnaming tool in DTS; otherwise, you must upload a copy of the Regional surnames to the DTS file.

3.6 Congressional Correspondence not Assigned by CCU or ExSec

Regional offices originating correspondence to Congress with an assignment from DTS are responsible for uploading the incoming correspondence in DTS (if applicable), drafting and finalizing response, and obtaining the proper surnames to include either the Regional AEA-CLA or AEA-CLA in Washington.

Regional programs mail the original correspondence and file it appropriately.

3.7 Non-congressional correspondence assigned by the ExSec Office

Use the same procedures as for congressional correspondence except, unless required, you do not need to include AEA-CLA in the routing in DTS.

Final Note

For the Washington Offices:

Any correspondence that will be signed in the Director's office or higher should not be printed on letterhead until the draft has been approved by all parties.

3.8 Interim Letters/Replies

Authors must make every effort to respond fully and completely to incoming correspondence by the due dates established, especially those controlled by ExSec.

If you cannot provide a full response by the assigned due date, you must prepare an interim letter immediately. For highly controversial or major policy issues that will not be resolved by the assigned due date, include a "Note to Reviewers" that explains the delay.

- Interim/partial response letters should include the following:
    - Statement that we are unable to provide all the requested information within the desired time frame
    - Any information gathered to date
    - A statement telling the reader when the remaining information will follow

- Interim/acknowledgement response letters include the following:
    - A statement that we are unable to respond within the desired time frame
    - Reason(s) for the delay

Once an interim letter has been written and signed, CCU will work with the appropriate office(s) to obtain a new due date, especially on correspondence that ExSec is tracking.

3.9 White House Referrals

All White House referrals are assigned by ExSec to CCU. CCU assigns them to the appropriate program or Region. Not all White House referrals require a written response.

For those that do require a response, follow the same procedures as for congressional correspondence.

The opening sentence of a White House referral must say that we are responding on behalf of the President, Vice President, or First Lady.

Appropriate opening sentence for White House referrals that the Director signs:

"Thank you for your letter of January 1, 2010, to the President of the United States, regarding -------------. President (name) has asked the U.S. Fish and Wildlife Service (Service) to respond directly to you."

Appropriate opening sentence for referrals that the Assistant Secretary FWP signs:

"Thank you for your letter of January 1, 2010, to President (name) concerning….. The President has asked the Department of the Interior (Department) to respond directly to you.

Appropriate opening sentence for referrals that the Secretary signs:

 "President (name) asked me to respond to your letter of January 22, 2010, regarding……."

*** Note***

Do not send official correspondence to the White House. These letters must be vetted through the appropriate offices. The Office of the Secretary has the final approval authority for any official letter that will be sent to the White House.

3.10 Memoranda

Use a memorandum for all official correspondence with individuals or organizations inside the Department.

3.11 Format

Reference Block: Use the same reference block for letter correspondence (see section 2.11).

Memorandum Line: Type the word "Memorandum" flush with the left margin and at least 3 to 5 lines below the reference block. Lines may vary in order to frame a document on the page.

"To" Line: Type "To:" flush with the left margin, two lines below "Memorandum." The title of the addressee begins directly under the last 'm' in "Memorandum." Use the complete title of the addressee whenever possible. List multiple addresses with each one beginning a new line. If you have to carry over a line, indent two spaces.

"Attention" Line: When applicable, the "Attention:" line is part of the "To:" line and you type it immediately below the title of the addressee.

"Through" Line: When applicable, type the "Through:" line flush with the left margin, two lines below the "To" line. Use the complete title of the reviewing official *whenever possible—do not use a person's name.*

"From" Line: Type "From:" line flush with the left margin, two lines below the "To" or "Through" line. Use the complete title of the signatory. Do not use the individual's name.

"Subject" Line: Type "Subject:" flush with the left margin, two lines below the "From" line. Describe the main issue and the requested action, if any.

If you are requesting a response by a specific time, put the request in the subject line in parenthesis and in bold (i.e. **Response due 30 days from date of this memorandum**). It is the policy of the Service to allow at least 30 days response to memoranda. Anything less than 30 days needs the Director's approval.

Body of Memorandum: The body begins two lines below the subject line. Second and subsequent pages should have a typed page number 1-inch from top, flush to the right, followed by two hard returns. You may number subparagraphs for clarity; however, you must not use an "a" without a "b" or a "1" without a "2."

Attachments: Be sure to describe any material that accompanies a memorandum in the body of the memo as an attachment. Type "Attachment" at least three lines after the last line of text, flush with the left margin.

Approval/Disapproval Line: When the memo requests the approval of a specific action by signature, use approval and disapproval signature blocks. If the memo contains an attachment, begin the approval/disapproval lines two lines below the attachment line. Include a date line to show when the decision was made.

Note

"For memoranda asking for the Secretary's approval/disapproval, we do not use the approval/disapproval signature block. The Secretary's signature indicates approval, and refusal to sign indicates disapproval."

For memoranda asking for the Secretary's approval, the memorandum is written as if the Secretary has approved the requested action. A transmittal memorandum must accompany the request indicating that we are seeking an approval of the request.

Chapter 4
Packaging Files using DTS

4.1 Washington Office Procedures

You must upload all correspondence into DTS. A complete DTS record includes the incoming document (if applicable), the draft response to include all versions, a surname log, all appropriate attachments (unless the attachment file is too big or not appropriate), and a note to reviewers, if applicable.

If the DTS record requires the Director or a higher authority to review, sign, surname, or take any other action, the file must be packaged in hard copy (downloaded and put into a folder along with routing slip), when it is ready for the Director's review. The program office responsible for the response is also responsible for packaging the file in hard copy.

All correspondence packages requiring signature or review by the Director or a higher authority must be routed through CCU. Following are examples of the types of records that do not require CCU review, however sending the hard copy files through CCU ensures timely delivery to the Director's office. CCU is not responsible for any lost packages that bypass CCU in the routing process:

- Travel Authorizations/Vouchers (foreign and domestic)
- News Releases (press release)
- Speeches
- Testimony
- Briefing Papers
- Federal Register documents
- Personnel Actions

All other types of correspondence must be routed through CCU before it goes to the Director's office.

4.2 Packaging Files from the Regional Offices

If CCU assigned the DTS file to the Region for response, CCU will package the file (prepare a hard copy) for the Region once the file is ready for the Washington office review.

All other packages incoming from the Region must be sent to the appropriate program office, and that office is responsible for downloading and packaging files. Following are examples of the types of records that go directly to the programs:

- Reprogramming Requests
- Policy/Chapter Revisions
- Briefing Papers

- Foreign Travel Requests
- Federal Register documents
- Awards
- Personnel Actions

If you are not completely sure what program/office a file should be routed to, contact your program/Regional secretary for guidance.

4.3 Draft vs. Final Format

All correspondence packages requiring the Director or a higher authority signature should be packaged as a draft. After the Director or higher authority surnames the package, either the Washington office program secretary or CCU will print the final correspondence on letterhead and obtain the appropriate signature.

Once you assemble a correspondence package, attach the DTS Control Slip to the package.

4.4 Control Slips:

Control slips are generated in DTS to put on the front of a surname package to show the routing. Following are the colors of paper for control slips for packages. Using color coded paper enables the Washington office staff to quickly identify the different types of packages:

ORANGE: Secretarial correspondence (items to be reviewed or signed by the Secretary or designated staff or other Departmental bureaus)

BLUE: ASFWP correspondence (items to be reviewed/signed by ASFWP)

YELLOW: Washington office programs (items to be reviewed/signed by the Director or Assistant Director)

PINK: Regional office correspondence (items to be reviewed/signed by the Director from the Regions)

WHITE: Federal Register Notices

GREEN: Sensitive Items in the SEN Database

PURPLE: Human Capital-type documents (awards, personnel actions, etc.)

GRAY: Briefing Papers (all types)

RED: HOT TOPICS/Fast Track (any correspondence determined to be "hot" (includes surname packages received outside of the Service)

4.5 Generating Control Slips in DTS

To get the control slip in DTS, on the Routing tree menu, click Control Slips. Then click View Control Slip.   Print the control slip and attach to the front of the package.

Note

If a control slip has already been generated, you must click New Control Slip if you want to add a routing.   There is also a version tool in control slips to see previous versions.

Chapter 5
Electronic Surnaming and DTS

All packages in DTS require electronic surnaming. Completing this step accurately is the responsibility of every program/Regional office.

Once you review a document and want to surname it, it is possible to attach an electronic surname using DTS.

Click on your program/Regional DTS office routing and you will see the following tabs:

- Routing
- Route Comment
- Append
- Surname

Click on Surname.

Fill out the fields appropriately and check the files you are surnaming.

If you are filling out the surname block for someone other than yourself, you must input their name and title. If you are surnaming the file, you only have to input your title.

You may use the Comment section for any comments related to your surnaming the document. For example: "w/ edits" or "No comments – good work." Or, you can leave it blank.

You can have more than one surname per office routing.

Using this tool provides us with a clean and readable copy of all surnames from each office, and the person preparing the final package can print out a surnames report to attach to the original hard copy file.

Chapter 6

Revision (Versioning) Documents in DTS

When a reviewer makes changes to a "draft" document, the reviewer needs to upload the changes into DTS using the versioning tool. This keeps the attachment tree free of clutter and helps to ensure program offices surnaming the document after you access the most up-to-date version.

Keep in mind that if you are making substantive changes to a document, it may be appropriate to communicate those changes to the originating office before you upload the revised version in DTS.

There are typically four main attachments to a DTS record:

- The incoming correspondence (the letter that the Service is responding to)
- The draft letter of response
- Note to Reviewers (if applicable)
- Attachments (if applicable)
- Final signed version

With the potential of each record having at least three attachments, it is very important that you use the versioning tool so the latest version is all that appears on the attachment tree. Do not simply upload a revised document to the tree. This confuses those surnaming the document after you.

To upload a version of a draft document correctly:

1. Save the draft letter to your hard drive and open it in Word.
2. Make your changes/edits.
3. Click on Attachments on the right-hand side of the record in DTS and all the attachments will appear on the lower left-hand side of the record.
4. On the draft document that you just edited, find the "Detail" column and click on the "V."
5. You will then see a screen that will have the tabs: upload version; finalize
6. Click on the Upload Version tab.
7. Attach your revised document.
8. Click on the Save button
9. You now have correctly versioned a document.

The most recent document shows on the attachment screen, and if you click on the "V," in the Detail column again, you can also see the previous versions. This gives the Service a clean paper trail showing who made what revisions.

Chapter 7

Assignments and Distribution in DTS

All Service Directorate and Regional staff memoranda that the Director or a designee signs will be distributed to the Service via DTS. It will be the responsibility of the Regional and program offices to ensure these types of memoranda are made available to their respective staffs and field offices.

For correspondence that is assembled for addressees outside of the Service, with the exception of congressionals, the originating office is responsible for ensuring it is sent to the appropriate office. For all Regional correspondence that is signed in Washington, CCU will ensure that the correspondence is sent to the appropriate office. Program offices are responsible for sending out any correspondence that they originate, unless otherwise coordinated with the CCU Chief.

When CCU distributes correspondence Servicewide, they only route to the top level of all programs and Regions. The programs and Regions must route to the appropriate offices within their organization.

Only route within your respective program/Region. The program/Regional Executive Secretary is responsible for routing to the top level of programs/Regions outside of their respective office. Doing this helps to ensure that the Regional and Assistant Directors know what types of assignments are incoming and outgoing to their Region or program. There are exceptions to this rule, and we encourage staff to discuss deviations from this practice with their program/Regional Executive Secretary.

Chapter 8

Best Business Practices for Using DTS

8.1 Assigning Correspondence

CCU will route correspondence to the Regional and program offices' Executive Assistants. Regional and program offices are responsible for routing to the appropriate offices within their Regions or programs.

Regional offices: Subordinate offices should route correspondence through their Regional Director's office. The Regional Director's office will route it to the appropriate Washington office.

Program offices: Subordinate offices should route correspondence through their Assistant Director's office. The Assistant Director's office will route it to the appropriate office.

Bottom Line: Subordinate offices should never route correspondence outside of their Regional or Assistant Director's office. Any correspondence that needs to be routed to a different program should always be routed through the originating office's Assistant Director, Regional Director, or CCU.

8.2 Prepare Draft Response

When Regional or program offices receive a task to Prepare Draft Response, they prepare the response for the appropriate signature (Director, Assistant Secretary, and Secretary) and send it to CCU in Word format through DTS.

8.3 Prepare Reply

When Regional or program offices receive a task to Prepare Reply, they prepare the reply for their AD's/RD's signature. Once signed, the AD/RD office should upload the signed reply to DTS and alert CCU that the assignment is complete.

8.4 Appropriate Action

Program and Regional offices receive many assignments labeled as "Appropriate Action." This means that Regional or program offices determine the appropriate action for the file (e.g., reading for informational purposes, filing, distributing internally, etc.).

8.5 Closing Task Assigned Folders

All offices need to close their folder in the routing tree after their task is complete. To do this, you enter the date you completed the task in the "Task Completed Date" field in the lower left-hand side of the record. This closes your folder and takes the record out of your inbox on your Home Screen. Depending on the record, once you've surnamed it,

you may need to route it to the next office (e.g., your program Assistant Director's office) for their surname. To do this, you click on their routing and insert the date you are assigning it to them in the "Task Assigned Date" field. Also click the "Send Email" box so that the assistants in that office are aware of the assignment. Then click the Save icon. This opens the assignment in their inbox and automatically generates an email to remind them they have a task.

8.6 Work Flow Report

We highly recommend that program and Regional offices use the work flow report to track correspondence from beginning to end. This report allows offices to close the folders once they have completed tasks and still track documents.

8.7 Multi-Office Assignments (Service Directorate, Regional Offices)

CCU makes assignments originating from the Director, Assistant Secretary, or Secretary to all program and Regional offices simultaneously. Program and Regional offices are responsible for any action required. If a response is required, program and Regional offices should upload their response in DTS and notify the office responsible for receiving the replies that they completed the task.

8.8 Addressee Line in DTS

All records entered in DTS must have an addressee. If the overall action of the DTS file is to send official correspondence (e.g., a response to an inquiry), the addressee is the person to whom the correspondence is going.

If the action is for the Director to read, sign, or approve a document, then the addressee is the Director.

8.9 Sending E-mails and Checking DTS Inbox

All DTS users should mark the "Send E-mail" box when assigning a task to another office. DTS users should not rely on e-mail notification to check their DTS inbox. Check your DTS inbox occasionally during the workday so that you are always aware of assignments.

Note

Do not rely on e-mail for notification of assignments in DTS. Be proactive and check your inbox regularly. "I did not receive e-mail notification" is not an adequate excuse for missing a deadline on an assignment.

8.10 Document Formats

Upload draft documents in Word. Scan final documents with signatures in PDF format.

8.11 Naming Protocol of Uploaded Files

All Regional and program offices should use the document control number and an easily searchable name/subject for all documents they upload into the DTS system.

8.12 Versioning

When dealing with draft documents in DTS, if a Regional or program office makes edits to the document, they should use the versioning tool. This keeps the attachment tree clean and provides a complete record of the changes to a document as they happen.

8.13 Controlling Non-CCU Related Documents

Programs and Regional offices should use the DTS system for controlling documents within their program areas. This system is a valuable tool for keeping track of all documents, not just those documents that are assigned or routed through CCU.

8.14 Routing a Record Through DTS

In most cases, when routing a record through DTS, there should only be one folder open at a time. When you are ready to route a record to the next office, you should assign it to the office and close your task folder.

Sometimes there are multiple office assignments where every program or Regional office has to complete a specific task. The DTS record is assigned to everyone at once and Regions and Programs should download the required documents and close out their file folder once their task has been completed. Routings should be kept in chronological order. If a routing is going back and forth between offices, do not change the date in an old routing—add a new routing instead.

8.15 Notes to Reviewers

When using DTS to send information to a Regional or the Director's office, the originating office should upload a note to reviewers. This is especially important for the receiving office to understand why they are receiving the information and what they should do with it.

8.16 Using Comments in DTS

Use the main comment section for overall routings. Use the routing comment for surname or a comment specific to the office assigned.

Do not use the comment fields as a note to reviewers. They cannot be printed.

8.17 Adding New DTS Users

Program and Regional offices should contact CCU when they need to add new users to DTS. Provide the following information:

- Correct spelling of the new user's name,
- Office/branch they are assigned to, and
- Level of access requested.

Programs and Regional offices should also notify CCU in a timely manner when we need to remove a DTS user's access to DTS (e.g., separation from the Service, change in position).

8.18 Deleting DCN Files

Program or Regional offices should contact CCU before deleting any DTS records. If you accidentally delete a DTS record, contact CCU as soon as possible so CCU can attempt to recover the file.

8.19 Using Correct Databases

SENSITIVE DATABASE: This database is restricted to certain users and is used for correspondence dealing with sensitive information (Inspector General investigations; complaints; performance reviews; promotions) or correspondence containing personal information such as social security numbers.

BRIEFING PAPER DATABASE: This database is open for all users for briefing papers. (EXCEPTION: We upload Federal Register Notices with Briefing Papers into the FWS Federal Register Database)

FWS NATIONAL DATABASE: All other records not pertaining to Sensitive, Foreign Travel, or Briefing Papers are in this database.

FOREIGN TRAVEL DATABASE: All records pertaining to travel outside the continental United States are in this database. This is a secure database with limited access.

FEDERAL REGISTER DATABASE: All records pertaining to Federal Register documents are in this database.

8.20 Maintaining a Healthy Inbox

DTS users should maintain their inboxes so there aren't more records in them than they can possibly track. If you have more than 25 open records in your inbox, you may miss an important assignment. If you need help in managing your inbox, please contact CCU.

8.21 Training Module

DTS users should complete the new training module (new and seasoned users). Completing this training will help give you the information you need to use DTS effectively and correctly. CCU tracks who has completed the training.

8.22 Closing the Overall File

When correspondence is signed at the Assistant Director/Regional Director/Director level, administrators should fill in the Signed Date, Signed By, and Closed Date located in the main screen of the document. Be sure you enter the date the document was actually signed—not the date it reached your desk.

Chapter 9

Federal Register Documents

For any questions or information regarding Federal Register documents please contact:

ABHC-PDM
Anissa Craghead	703-358-2445	Anissa_Craghead@fws.gov
Sue Wilkinson	703-358-2506	Susan_Wilkinson@fws.gov
Sara Prigan	703-358-	Sara_prigan@fws.gov

Division of Policy and Directives Management
U.S. Fish and Wildlife Service
Mail Stop 222, Arlington Square
4401 N. Fairfax Drive
Arlington, VA 22203

You can also information about Federal Register documents via the following Web pages:

For Correct Formatting Procedures:

http://www.archives.gov/federal-register/write/handbook/

To View Published Federal Register Notices:

http://www.fws.gov/policy/frsystem/default.cfm

Please refer to the Service Manual Part 202 for information about rules and notices for publication in the Federal Register:

http://www.fws.gov/policy/manuals/part.cfm?series=200&seriestitle=ADMINISTRATION

For rules:
202 FW 1 Overview and Definitions for Publishing Federal Register Documents
202 FW 2 Preparation for Rulemaking
202 FW 3 Compositions and Content of Rulemaking Documents
202 FW 4 Clearance Procedures for Rulemaking Documents
202 FW 5 Federal Docket Management System (FDMS)

For notices:
202 FW 1 Overview and Definitions for Publishing Federal Register Documents
202 FW 6 Compositions and Content of Notices
202 FW 7 Clearance Procedures for Federal Register Notices

For Using DTS to process Federal Register Notices, you can contact:

Domi Hernendez:	202-208-7535	domi_hernendez@fws.gov
Donnise Hancock	202-208-7535	donnise_hancock@fws.gov

Chapter 10
Briefing Papers

10.1 Briefing Paper Database

Upload all briefing papers into the DTS briefing paper database. Following is a list of the types of briefing papers that we typically upload and route to the appropriate office:

Information Memos
Decision Memos
Event or Meeting Proposals
Approved Event Information Forms
Recommended Telephone Calls

10.2 Responsibility

Each Region and program office is responsible for ensuring that briefing papers are in the correct format and their content is correct before uploading it into DTS.

10.3 Format Specifics

Format all briefing papers as follows:

Margins: Left Margin: 1.25"
                 Right Margin: 1.25"
                 Top: 1"
                 Bottom: 1"

Font: 11- or 12-point Times New Roman, except that briefing papers for the current Acting Secretary of Fish and Wildlife and Parks (A/S FWP) must be in 14-point Times New Roman.

Do not use bullets, special characters, underlining, italics, or bold unless an outline specifically calls for it. Refer to samples in this handbook when preparing briefing papers.

10.4 Addressee Specifics

If the briefing paper is for the Secretary, Deputy Secretary, or A/S FWP, use the Director in the "From" blocks on all papers.

If the briefing paper is for the Director, use the Assistant Director or Regional Director in the "From" block on all papers.

10.5 Note to Reviewers

All briefing papers, with the exception of the Travel Information Memo, must have a "NOTE TO REVIEWER" with the following information:

- Who requested the briefing paper
- Who needs to review the briefing paper
- Who approved the briefing paper being submitted

10.6 Using DTS to move briefing papers

Upload all briefing papers in Word into DTS's briefing paper database.

The "ACTION" is "2-Appropriate Action."
The Document Type is "Briefing Paper."
The Subject line will contain the type of briefing paper, who it's for, and what it's about. For example:

> IM-S-Polar Bear Update (AES): Travel memo (TM) for the Secretary (S) about Polar Bears from Endangered Species (AES)

The Addressee is who the briefing paper is for: Secretary, Deputy Secretary, A/S FWP, or Director

10.7 Naming Protocol for Word Documents

We prefer you name your briefing papers as follows:

BP028115 TM-S- Bald Eagle R1.doc

BP means….This enables any reviewer to be able to quickly find documents when they are downloaded into their system for editing.

10.8 Versioning

You must use the versioning tool when correcting or editing briefing papers. This enables the next reviewer to quickly go to the most recent version.

10.9 Routing Briefing Papers

<u>**REGIONS:**</u>
For briefings for the Director or higher, you must route to the appropriate program office in the Washington Office (WO) for surname.

<u>**W/O Program Office:**</u>
Program offices are responsible for surnaming and downloading briefings from the Regions for the Director or higher offices. Any briefing or scheduling events for the Assistant Secretary or Secretary office must be routed through AES. All others may be sent directly to the Director's office once you assemble the package.

E-mail scheduling requests for the Director directly to the Director's secretarial staff.

10.10 Final Copies

It is the responsibility of the originating office to ensure that the most recent version of final, surnamed briefing papers are uploaded into DTS. When you need to update briefing papers, use the versioning tool to upload the newest version. Do not create a new DTS record.

10.11 Purpose of the Briefing Paper Database

The intent of this database is for users to quickly find briefing papers on various subjects. Once a briefing paper is in the system, users are encouraged to use existing briefing paper information and update it as needed. In the future, when a data call goes out for "hot topics," the core of your message may already be prepared and we can find it in the existing database. This saves everyone time as you only need to add the updated version and a new Note to Reviewers and send it forward.

10. 12 Briefing Paper Samples

Please use the following samples as your guide in preparing briefing papers:

(DATE)

INFORMATION MEMORANDUM FOR THE SECRETARY (or Director or A/S FWP etc.)

FROM:

CC:

SUBJECT:

I.   SUMMARY

(Three (3) sentences or less)

II.   DISCUSSION

(Please be concise)

PREPARED BY: _____   **DATE:** _____

(DATE)

DECISION MEMORANDUM FOR THE SECRETARY

FROM:

TELEPHONE #:

SUBJECT:

III. STATEMENT OF THE ISSUE

IV. BACKGROUND

(Please be concise)

V. OPTIONS

(Must include at least two (2) options)

VI. PRO/CON ANALYSIS

(Include a discussion of key constraints)

VII. RECOMMENDATION

VIII. SECRETARIAL DECISION

Option 1 ___   Option 2 ___   Further Discussion ___

PREPARED BY: _____ **DATE:**_____

(See 301 DM 1 for further information)

Approved Event Information Form

Please provide the following information and return this form by email to the Office of Scheduling & Advance. Thank you!

PLEASE NOTE: All materials that use the Secretary's name and all press releases/media advisories must be approved by the Department of the Interior <u>in advance</u>.

TODAY'S DATE:

DATE OF EVENT:

FROM: 	*Your name*
	Your organization
	Your phone number: (office, cell and home)
	Your email

EVENT: 	*What is the title of the event?*

	What is the date and time of the event?

EVENT SPONSORS:

LOCATION DETAILS:
	Please list the physical address, telephone number, and fax number of the event site, as well as the name of room the event in which the event will be held.

	County?

	What is the best entrance to the event site? Is this the same entrance the public is using? If so, is there another option available?

	Who will be meeting/greeting the Secretary upon his arrival and where exactly will he be met (escorted from the curb, meeting escort at concierge desk, etc)?

Is there a holding/prep room for him to wait in or use if necessary before appearing at the event? Is there a restroom in it, or where is the nearest?

ROOM DETAILS:

Is there a podium? Yes/No.

Is there a microphone? Yes/No.

Will there be a stage? Yes/No.

Describe the backdrop: Will there be any logos on the stage, behind the stage, or on the podium? If so, what are they?

What is the set up of the room? Round tables, Conference style, etc. Do you have any pictures or diagrams of the room that you could send in advance?

Where will the Secretary be seated?

REMARKS:

Are you requesting the Secretary to speak? Yes/No.

If so, how long should the remarks be and what topic should they be on?

Who is the audience?

Will the Secretary need a speech or just talking points?

Who is the best point of contact should our speechwriter have any questions?

PERSON INTRODUCING THE SECRETARY:

Name of person introducing the Secretary
*Does the above person hold **any** official position or designation*

within a political party? If so, please list. If not, write, "This individual holds no position." If biography is available, please forward it as well.

OTHER PARTICIPANTS IN THE PROGRAM:

List all other speakers, emcees, awardees, participants, etc involved in the program with their titles.

Are any other DOI officials invited or participating? If so, please list with titles.

TABLE LIST:

If the Secretary will be staying for a meal, please list all individuals who will be seated with the Secretary. Please include official positions & titles. If biographies are available, please forward them as well.

ATTENDEES:

How many people are expected?

Do you have a list of VIPs who will be in attendance?

How many people are confirmed guests?

When will a solid number be available?

What is the max capacity of the room?

EVENT LINE-BY-LINE:
(Program with timing)

*A*TTIRE:

Formal, business, casual, outdoors, etc.

COST OF MEAL, ETC:

List the value of the meals, the price of the event ticket, or value of

any memorabilia etc. that will be presented to the Secretary. No gifts or honorariums, please, due to ethics restrictions. Consider all expenditures that the solicitor/ethics office may need to review.

PRESS POINT OF CONTACT:
Is this an open or closed press event?
Is there a PR firm for the event, or a press point of contact?
What is their phone number/fax number/email?

PRESS CONFERENCE:
Is there a press conference scheduled? If so, what time?

Is it in the same room as the event? If not, where is it?

What is the backdrop? Logos, banners, flags, etc?

Is there a podium sign or seal? If so what is it?

Will a multi-feed audio box be available for the media? Yes/No

Is there sufficient lighting in the room? Yes/No

SECURITY POC:
Who should the Secretary's security detail contact if they have any questions?

Name
Organization
Phone number: (office, cell and home)
E-mail

DOI SECRETARIAL EVENT or MEETING PROPOSAL   TODAY'S DATE:

TO: Scheduler to the Secretary

FROM: *Your name*
                  Your phone number: (office, cell and home)
                  Your email
                  Your organization

REQUEST: *Title of Event and the Secretary's role*

OFFICIAL   OR   POLITICAL   (Please Underline and Bold what type of event
this is)

PURPOSE: *What is the purpose of the Secretary's participation? Please include a*
                  short history of DOI involvement (if any) and a brief background of the
                  group requesting Secretarial participation.

RECOMMENDATION: *To be completed by DOI officials only: Please state your name,*
                  title, and whether you recommend that the Secretary participate in this
                  event

EVENT DATE: *Month, Day, Year*

EVENT TIME: *Start time – End time*

                  Proposed time of Secretarial participation:

                  If this time does not work for the Secretary, are there any options?

LOCATION: *The building name, address, room number, city, county, state*

    If the event is outside of the Washington DC area:
                  What is the closest airport?

                  How far is the airport from the event location?

                  In whose Congressional District will the meeting take place? Who are the
                  U.S. Senators?

REMARKS: *If the Secretary is expected to give prepared remarks:*
                  Topic of remarks:
                  Length of remarks:
                  Who is the audience:

ATTENDEES: *Number of people expected to attend the event*

PARTICIPANTS: *List the names and titles of the people participating in the meeting with the Secretary. Include the names of any other speakers and DOI officials that are asked to participate.*

EVENT OUTLINE: *Please provide the sequence of events. For example: 15 minutes of briefing for the Secretary, 10 minutes of Q&A and 3 minutes for a photo.*

PRESS: *Indicate Open or Closed to Press; Live or Taped; Local, Regional or National media. TV, Radio, Type of print. Is anyone asking for interviews?*

POSSIBLE SURROGATE: *If the Secretary is unavailable, is there another DOI official whom you would like to have attend?*

EVENT CONTACT: *Persons responsible for answering policy and logistics questions about the meeting.*

Department of the Interior POC
office:
cell:
e-mail:

Organization / Scheduling POC
office:
cell:
e-mail:

Event Location POC
office:
cell:
e-mail:

NOTES:

FOR THE OFFICE OF SCHEDULING AND ADVANCE TRACKING PURPOSES ONLY:

___ ACCEPT   ___ REGRET   ___ PENDING

IF CONFIRMED, DATE AND TIME: _____

Briefing Officer _____ Briefing Paper Due _____	Photographer Needed _____ Advanced Assigned _____
Speechwriter Assigned _____ Speech Due for Comments _____	Approved Event Form Sent _____ Approved Event Form Received _____
Recommendation:	Surrogated to:

ACTION ITEMS:

RECOMMENDED TELEPHONE CALL

TO: Name and telephone number of person you recommend that the Secretary call. (Brief identifying information when you suspect name will be unfamiliar to the Secretary.)

DATE: Date the Secretary should make the call.

RECOMMENDED BY: Your name and telephone number, and if recommendation has concurrence of another staff member, so state.

PURPOSE: Preferably one sentence; two at most.

BACKGROUND: Whatever background information you feel will be helpful to the Secretary. Usually 3-4 short sentences will suffice to set the stage and give substance to talking points. Also, make sure that no letter has been sent for same purpose as the call and so indicate by stating this in the background.

TALKING POINTS: 1.

2.

(The specific points you recommend for the Secretary to make during the conversation.)

4.

PREPARED BY: _____ **DATE:** _____
ACTION: _____

Meeting Event Proposal

HEADING (Example: Meeting with NACO)

(DATE)
(LOCATION)
(TIME)

FROM: (Name of Senior Staff person
                    responsible for meeting)
                 (Telephone Number)

I.   PURPOSE

(State Purpose of meeting)

II.   BACKGROUND

(Briefly state relevant context in which meeting arises, issues of special concern
to parties, as appropriate, etc.)

III.   PARTICIPANTS

(List)

IV.   PRESS PLAN

(Specify press coverage, photo opportunity, no coverage, etc.)

V.   SEQUENCE OF EVENTS

(Outline meeting agenda)

PREPARED BY: _____   DATE: _____