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Going GrEEn for a sustainable future

OFFICE OPERATIONAL PROCEDURES TEMPLATE

CONTENTS

1. Introduction

This manual on Office Operational Procedures at <[1]Company Name> is prepared to guide all staff assigned to the <Company Name> on general office procedures, on matters related to work, internal and external matters, relation to other staff, and other matters which need agreed procedures. The rationale behind these agreed "playing rules" is also to ensure the highest possible quality of work.

This manual is not complete, and can never be so, as changes may happen over the time. As and whenever necessary, [2]management will issue Memoranda, which will form a part of the office procedures. Suggestions from staff will at any time be welcome.

This manual is for all staff at <Company Name>. All staff should be playing as one team, and as such follow the same rules.

2. Office Equipment and Facilities: Management and Responsibility

- All equipment purchased shall be enlisted in an "[3]Inventory List," which is the responsibility of the [4]Finance/ Accounts Manager.
- Some equipment will be designated to individual staff; in such cases, the [5]Finance/ Account Manager will issue a Memorandum Receipt assigning the care/use of the equipment to a designated Property Custodian.
- The computers are assigned to [6]action officers. Daily care of these is therefore the responsibility of the designated staff. The specific responsibility is contained under the section, "Operation of Computers and other electrical equipment."
- For office equipment not released to specific individuals, like projector, sound system, CDs, TV, etc., these are under the care of the [7]Partner.

All staff must follow some basic rules:

- Keep order always.
- Follow the instructions on how to handle assigned equipment, especially computers and similar equipment.
- Keep a proper filing system for working notes and documents, but do not store outdated materials. These occupy space, and the office has only limited space. Some filing space will be assigned to staff but only to be used for essential papers.
- Do not use the floor as a storage area. This will enable us to clean the office properly and keep pests out.
- Do not use your colleagues' working area or file space.
- The facilities assigned do not last forever. Therefore, all staff are required to care for them, but should anything need repair, a report should be sent immediately to the [8]Partner.

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Kindly note that the content in this document can be modified to suit your business
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Operation of Computers and other Electrical Equipment

Specific Instructions:

- Unless otherwise stated, electrical power of all office equipment must be TURNED OFF at the end of the office hours or after use of the equipment whichever is later.
- The assignee is responsible for turning off the electrical power of each assigned equipment at the end of office hours.
- If the electrical equipment is used outside the regular office hours by staff members other than the assignee, the concerned assigned staff is still responsible for turning off the equipment and therefore must ensure that the last user of the equipment during the day will turn off the electrical power of the equipment after use.
- The assignee is responsible for the daily operation and periodic cleaning of each assigned electrical equipment. Under no circumstances should the equipment be used by unauthorized parties.
- No more than [9]three computers must be plugged in simultaneously into one [10]Automatic Voltage Regulator (AVR).
- Before plugging the power cord of each equipment into an electrical power outlet or AVR, it must be clearly established that the total power requirements of all equipment plugged into said power outlet (or AVR) is below the maximum power rating of the power outlet (or AVR).
- In case of uncertainty as to the electrical power requirement of equipment, consult with the [11]Partner.
- All AVRs must be turned off at the end of the office hours by the assigned staff or by the last user of the computer connected to the AVR. The AVR connected to Local Area Network (LAN) line hubs may be left powered on.
- [12]LAN printers will be turned off at the end of office hours.
- All office lights and air-conditioning units must be turned off by the last staff member to leave the office premises.

Vehicles: Use and Maintenance

The vehicles at the <Company Name> consist partly of cars.

The following rules for the daily management of vehicles shall therefore be applied: Under the overall responsibility of the [13]Partner.

- **Personal Use of Vehicles**

The use of company vehicles shall be observed in the following manner:

i. Any personal use of the vehicles is prohibited. However, the use of the vehicles may be granted occasionally for humanitarian reasons. Such reasons may be the transport of a sick family member for hospital treatment, a staff member's wedding, transport of personal belongings in case of the moving from one place to another, and other similar situations.
ii. Request for any such personal uses shall be requested to the [14]Managing Partner who is the only one who can authorize such uses.

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iii. The general upkeep of a borrowed vehicle will be at the responsibility of the borrower (e.g., fuel, oil, repairs in case of accidents, washing, etc).
iv. Any tickets, (Moving violations, parking violations or otherwise) given by police, are the sole responsibility of the driver of the vehicle. Organization funds will not be used to pay for tickets or fines.
v. The vehicle must be returned CLEAN.
vi. It is the responsibility of the driver to inspect the vehicle prior to accepting the keys. If there are any body damages (Dings, dents, etc.), please fill in the Body Damage section of the Check-In / Check-out Form. If the body damages exist before departure, you must specify this on the vehicle form. Damages that occur after departure, or those that are unaccounted for on the form, may become the responsibility of the requesting department.
vii. All drivers must be authorized by the [15]Partner prior to the trip.
viii. All vehicles will be provided with a full tank of fuel. Fuel used during the trip will be charged to the requesting section. The cost of fuel will be based on fuel prices at the time of the trip.
ix. Upon return of vehicles, the [16]Partner and authorized driver will inspect the condition of the vehicle. Any damages will be charged to the requesting department.
x. Only licensed /approved drivers may drive the vehicle.
xi. No alcoholic beverages are allowed in the vehicle.
xii. Vehicle must be returned in the condition it was in at pick-up.

Maintenance

- The assigned driver has the responsibility for all general maintenance, upkeep, and repair works on the assigned vehicle.
- The [17]Partner shall draw up a maintenance schedule for all the vehicles. It is the responsibility of the driver to inform the [18]Finance/Accounts Manager of all necessary maintenance and repair works for which the vehicle may need to be placed at a repair shop.
- The [19]Partner must furnish the [20]Finance/Accounts Manager with the maintenance schedule of all <Company Name> cars and copied to the [21]Managing Partner.

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- **Telephones**

Telephone Lines

The <Company Name> telephone lines consist of [22]one (1) direct line

General Instructions on Use:

i. Limit personal calls to a minimum, and only for emergency purposes. Lengthy personal calls limit communication possibilities and are regarded as an abuse.
ii. Limit usage of the fixed lines for dialling mobile contacts. All outgoing calls should be work-related.

- **Office Information Systems**

<Company Name> Office Directory

This computerized database was developed in [23]MS-Access format. It contains the [24]names, addresses, telephone, and email addresses of individuals and must be agencies that have been in correspondence with the office. The database will be periodically updated to accommodate new entries or changes in encoded information. This database is maintained by the [25]Partner.

In case of accidental deletion of files, file corruption or other similar file problems, the backed-up file copies may be used to avoid total loss of the file (s). Contact the [26]LAN Administrator to restore the latest version stored through the back-up procedure. Users are advised that restored back-up copies of files may not be exactly like the user's latest file version since the back-up file may have been edited by the user after the back-up was made.

Filing of Materials/Documents

All units/groups in <Company Name> shall file the original copies of reports, proposals, important documents, and other relevant materials together with the Compact Disc (CDs) of the said reports. These documents will be properly labelled and classified for easy retrieval and use (e.g., for general use, classified materials/confidential, etc.)

Filing and Storage of Inactive File

- Each unit/working group has a designated area for its files.
- These files shall be properly labelled for easy retrieval and use.
- An assessment of the files shall be done by the units to identify those which can already be rendered inactive.
- Inactive files shall be properly labelled (including the year) and stored in a proper manner.

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Photo Library, Slides and Videos

Documentation would pertain to photos, slides, video CDs. These items although semi-expenditure in nature must be properly accounted for. The following rules shall therefore apply:

- Processed films and slides must be checked and certified by the [27]Partner**.**
- All tapes (CDs) must be properly labelled and filed in the library. A logbook will be provided to record the use of these items when taken out of the library.

Photo Copying

The [28]Administrative Assistants have the daily responsibility for the Photocopier machines, their operation and maintenance and supply of copy paper. Employees are to handle the machines with care. Should any employee encounter problems, (misfed paper, lack of toner, etc.), they should ask the [29]photocopy leasing company for assistance. Except for urgent matters, employees should schedule of reproduction priorities will be on a strictly project date basis.

As a matter of principle, reproduction of personal matters is not allowed. On occasional basis, copying of a few papers will be accepted. However, should employees wish to reproduce a larger number of copies, such as chapters of a textbook or the like, for educational purpose, they should ask the [30]Managing Partner for permission. They will then normally be requested to reimburse the cost of the paper.

Office Equipment: Bringing in and Out of the Office

Except on official business, no office equipment (except for laptops) will be allowed to be taken out of the office. In such a case, a Borrower's Slip/Gate Pass must be duly accomplished and approved by the [31]Partner. It should state the purpose for taking out the equipment (i.e., training, etc.), the full description of the equipment, the date the equipment will be taken out of the office and the duration of its use.

The approved Borrower's Slip/Gate Pass must be presented to the [32]Security Officer before the equipment being borrowed can be allowed to be taken out of the office. Upon returning the equipment, the original should then be filled in with the return date and signed by the receiving person.

The [33]Property Custodian should inform the [34]Partner regarding items that have exceeded their "On Loan" periods, damaged equipment, etc. and shall subsequently inform Management.

<Company Name> Newspapers

The <Company Name> subscribes to a few daily newspapers. The purpose of this is to follow and monitor public information and activities. Articles of interest will daily be identified and cut out of the papers.

Please observe the following rules and procedures for the handling of the papers:

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[33] Kindly change to the equivalent role in your business
[34] Kindly change to the equivalent role in your business

- Upon the arrival of the newspapers in the morning, the [35]Administrative Assistants will compile them in a "[36]newspapers folder."
- Anybody can hereinafter borrow the newspapers, if they will not be removed and/or detached from the folder.
- After reading the newspaper it should be returned to the [37]Administrative Assistants. When reading the newspaper, you may find articles of interest, relevant to <Company Name>. The company therefore asks for employees' assistance; to write on the front page of the newspaper the number of the page, where they identified an interesting article.

Kitchen and Lobby Facilities

The kitchen is the designated area for eating the regular meals (breakfast, lunch, and dinner). The utensils should always be cleaned and kept in their proper places. Utensils should not be left on the table after use. All staff are encouraged also to help in the washing of the utensils after use.

The kitchen area also has a limited storage facility. No staff can on their own utilize these storage facilities. The [38]Meeting Room is also the entrance to the office. Visitors get their first impression of the office when they enter the reception. The Meeting Room is waiting area for visitors, and vendors cannot promote their products there. Therefore, everybody should help to keep it clean and orderly.

The [39]Message Board at the Main Office will be used for posting announcements regarding activities of <Company Name> and other information for dissemination to the staff.

Office Cleanliness and Orderliness

All employees are enjoined to keep their work areas clean and orderly. To further maintain orderliness in the office, staying and sleeping in the premises beyond office hours is prohibited.

3. Office Operational Procedures

A. Incoming and Outgoing Letters

- **Incoming Letters**

To ensure a proper action on incoming correspondence and proper central filing, the following procedures shall be followed: The [40]Administrative Assistants shall receive all incoming correspondence and fill-in a logbook. All correspondence hereinafter goes to the Partner for the following:

i. logging of action.
ii. copy to person-in-charge for action.
iii. Original to central files.

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[38] Kindly change to the equivalent location in your business
[39] Kindly change to the equivalent platform in your business
[40] Kindly change to the equivalent role in your business

B. Outgoing Letters

The [41]Partner shall record all outgoing correspondence specifically:

- Receiving office/person.
- Purpose, action, or decision required (ex. for information, dissemination, request for approval, for signature, etc.)
- A copy of the correspondence to central file.

The same procedures shall be followed as incoming and outgoing letters.

C. In/Outgoing E-Mail

The office maintains an official e-mail address and mailbox for the delivery and receiving of all official office correspondence through e-mail.

- All <Company Name> staff members are encouraged to take advantage of the <Company Name> e-mail facilities.
- The official office e-mail address is [42]info@<company name>.com
- All employees have been given official email addresses.
- No official emails should be sent using personal email addresses.
- All official emails should be copied to the sender's immediate supervisor.

D. Signatory to Letters, Memos, and Other Correspondences

- The [43]Managing Partner /Designee shall sign all correspondences to government, private and other non-governmental organizations, and other external entities.
- Where necessary, the letter may be signed by the [44]Managing Partner/ Designee and the Section Head concerned. These correspondences may be classified as: letters of invitation, response to inquiries, requests for information and other related concerns.
- Letters and other correspondence regarding specific concerns and for information purposes within the different sections of <Company Name> shall be signed by the Section Heads concerned.

E. Standard Format for Letters, Memos, etc

In Appendix 16 and 8, a 'standard letter format' and a 'standard Memo format' are presented. The design formats presently being utilized will later be changed to adapt the design formats prescribed in this document.

4.1 Handling of Funds

i. Purchase of Equipment, Consumables, Services and Accounting Procedures

The following rules and policies shall apply for all purchase of equipment and consumables and entering any service contracts.

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[42] Kindly change to the equivalent format used in your business
[43] Kindly change to the equivalent role in your business
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ii. Approval/Authority Limits

Every purchase of equipment, consumables or entering into any other kind of services agreements or activities shall be requested and supported through a [45]Purchase Requisition Form or (for services and activities) other written request as appropriate, and in accordance with the subsequent clauses.

Approval of requests rests with the [46]Finance/Accounts Manager and Managing Partner. No staff can enter any financial commitment or obligation without the prior approval of the persons stipulated above. The approval of payment of salaries of <Company Name> paid staff and consultants rests with the [47]Managing Partner.

4.2 Discounts

All discounts above [48]15% on Sales and Marketing items must be discussed with the [49]Managing Partner and the Finance/Accounts Manager.

A. Budget and Approval of Proposed Activities

Activities such as training Programmes, conferences, workshops, shall be requested and presented to the [50]management for approval prior to any commitment.

A summary description of the proposed activity indicating background, objective, and relevance for the <Company Name> together with a cost estimate shall be submitted to [51]Management to be checked for relevance (policy) and budget requirements.

With the approval from the management of the activity, further preparatory work for the activity can be continued. Any purchase of equipment or any other financial commitment shall hereinafter follow the rules and policies as given elsewhere in this handbook.

B. Purchase of Equipment

- A Purchase Requisition (see Appendix 14) shall be filled-in indicating all pertinent specifications/descriptions of the equipment to be purchased. The purchase requisition shall be signed by the requisitioner and shall be presented for approval.
- For purchase of equipment with a cost of more than [52]one thousand Ghana Cedis GH¢1,000 (Three quotations from potential suppliers will usually be requested. In case of Brand preference, the [53]Managing Partner may approve this within the limits given.
- Upon delivery of the purchased goods, this shall be inspected by the [54]Finance/Accounts Manager before payment.
- Inventory items will hereinafter be registered in the [55]inventory list by the Finance Section.

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[55] Kindly change to the equivalent location in your business

C. Purchase of Office Supplies

Responsibility and authority for the purchase of common supplies and consumables for the office and office work rest with the Partner in collaboration with the Finance/Accounts Manager.

- Purchase requisitions for consumable items shall be submitted to the Finance/Manager,
- Brand preference may be indicated. Otherwise purchase decisions will be based solely on the least cost to <Company Name>.

a. Hiring of Professional Services/Consultants for Specific Projects/Activities

- A Memorandum shall be prepared for approval by the [56]Managing Partner, indicating the need or purpose for the assistance to be hired. Reference should whenever applicable be made to previous approved activity description.
- A contract must be prepared for the services to be rendered by resource persons, guest speakers, facilitators, etc.

D. Meetings

- **Meeting Expenditures**

There are various categories for defined meetings, and allowance and permission for costs related to the conduct of meetings will follow the following guidelines:

- **Internal meetings at <Company name>**

These are meetings between <Company Name> staff, such as management meetings, departmental meetings, and meetings with management.

As a rule, only [57]coffee and tea can be offered. [58]Snacks or light meals will sometimes be offered by the <Company Name>.

- **Meetings with Very Important Persons (VIPs)**

Occasionally, the <Company Name> staff meets with high-ranking persons, who are of utmost importance for the organization. In such cases, snacks, or a meal with the person(s) can be refunded by <Company Name>, upon submission of a proper meeting expense form together with original vouchers.

- **Workshops, training, seminars**

When a bigger group is meeting for one whole day, or several days, an arrangement with a catering service or a fast-food centre can be arranged. As it often happens, that the actual

[56] Kindly change to the equivalent role in your business

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number of participants is less than expected/invited the final ordering of catering services (or fast-food services) shall only take place after the number of participants has been confirmed.

E. Cash Advances and Liquidation

Cash advances for prior approved expenses can be made in accordance with the following procedures and by submission of a written request, a sample of which is presented in Appendix four (4).

- Cash Advances amounting to less than [59]GH¢1,500 can be authorized and handled by the [60]Office Manager/Accounts Manager.
- Cash Advances amounting to more than [61]GH¢1,500 must be approved by the [62]Managing Partner prior to advance.
- In any of the two above cases, a [63]Cash Advance Request shall be filled in.

Cash Advances shall be liquidated immediately after the advance has been used. Failure to do so might result in refusal of future requests for the person in question.

- File your liquidation soonest, returning all excess advances.
- Submit a liquidation report/summary of various types of account expenses.

F. Reimbursement of Petty Cash Expenditures

Petty cash expenditures are such minor expenditures you may have shouldered out of your own pocket, and which falls within acceptable expenditures of the office. Typical examples are taxis, toll, parking fees and the like.

- Petty Cash expenditures with supporting documents can be handled by the account section.
- Petty Cash expenditures without supporting documents require the approval of [64]Finance/Accounts Manager prior to reimbursement.

G. Routines for Project Accounting and Control

On a [65]monthly basis the accounting section encodes the individual entries of expenditures under the respective budget accounts. An [66]Expense Summary Report is hereinafter prepared, which includes a listing of individual entries, grouped according to budget accounts.

Further, a Bank Reconciliation Statement is prepared, giving the balance as of the end of the month. The complete material is subsequently presented to the [67]Managing Partner. The overall responsibility for the <Company Name> Accounts rests with the [68]Managing Partner, who also monthly checks accumulated expenditures against budgets.

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4.3 Conduct of Meetings

General Ground Rules in the Conduct of Meetings

- Notice of Meetings shall be announced at least [69]one week before the scheduled date. This should include the following information:

i. date, time, venue
ii. persons/staff involved
iii. purpose/agenda of the meeting

- The minutes of the previous meeting shall also be distributed [70]a week before the scheduled meeting.
- Any required rework and report shall also be given prior to the meeting, so that concerned staff can prepare for these.
- All staff concerned should **come on time** and be prepared for the meeting.
- During the meeting, everyone is encouraged to actively participate, listen and be open to new ideas.
- A documenter/secretary shall always be assigned to record the minutes and agreements reached, as well as the persons assigned to specific tasks.
- One person shall be appointed as responsible (chair) of the meeting. The person responsible for the meeting is also responsible for preparation of Minutes of Meetings, and to follow-up on agreed actions, although he can decide to delegate the task to other participants.
- The meeting area should be cleared after use, and this will be the responsibility of the [71]documenter/secretary and/or the organizer of the meeting.

A. Office Meetings

Office Meetings shall be held weekly on [72]Mondays.

The Purposes of the meetings are:

- For the Team to provide updates on matters concerning <Company Name> and other agencies.
- For the [73]Action Officer and Unit Heads to report on their accomplishments, highlights of their activities and major concerns; and
- To exchange information and views on on-going assignments.

A special meeting may be called for at any time to address specific matters that require immediate actions and/or decisions. The Members of the Management are the following:

- [74]Managing Partner
- Departmental Heads

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B. Usage of Meeting Areas and Facilities

After a meeting, it is the responsibility of the [75]Secretary/Recorder to ensure that the meeting area is properly cleaned-up, that the white-board is cleaned, papers properly disposed of, and equipment used is properly packed and brought back to its place of origin.

4.4 Submission of Reports

A. Monthly Progress Report

Each section shall submit a monthly accomplishment report which highlights its major activities and achievements viz-a-viz the targets set. The accomplishment report shall be submitted to the [76]management and to the Managing Partner not later than [77]a week of the following month.

B. Monthly Management Report

Based on the information contained in the Progress Report submitted by the sections, a summary version on essential aspects on work progress and managerial issues for the month will be consolidated into a Monthly Management Report. The Management Report will be distributed by the [78]Partner within the [79]second week of the following month.

C. Quarterly Report

A Quarterly Report will be prepared by the [80]Partner together with the [81]Management. The input to the report is based on the monthly accomplishment reports prepared by the individual Sections. The report will be circulated to all the Sections.

D. Year-end Report

A Year-end Report will be produced by the [82]Finance/Accounts Manager with the help of the [83]Partner. The report reveals the year's targets, accomplishments, and constraints. All the sections are required to prepare their individual inputs in accordance with the guidelines set by the [84]Finance/Accounts Manager. Special emphasis is given on specific data and quantifiable measured against the year's target. The Report will be distributed by the [85]end of January each year.

- **Individual and specific reports**

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A number of individual activities of the <Company Name> and also some partner agencies require separate reporting.

Examples are:

- Training Courses
- Consultant's Special Reports

These reports should be produced as and when they are required or requested.

Standard formats for reports

All other reports produced internally as a product of <Company Name> shall follow the standard format prescribed by the <Company Name>.

In Appendix 2 hereto is given a description of the reporting format.

Handling of Visitors

- All visitors shall first approach the receptionist/secretary.
- Visitors will be requested to wait in the Meeting Room.
- Receptionist will inquire re: purpose/person being visited.
- Receptionist will check with the staff/personnel concerned: his/her availability.
- Receptionist will request the staff to see the visitor in the Meeting Room.

Handling of Vendors

All vendors shall be entertained outside the office.

4.5 Quality Assurance: General Framework

A. Quality Objective

<Company Name> has the following quality objective:

'Any service must be carried out in such a way that the agreements made with the Client are fulfilled in a professional, efficient and conscientious manner.' Thus, the company's activities are based on agreements with the client.

B. Quality Policy

- **Professionalism** which implies great professional skill, creativity, and technological knowledge.
- **Efficiency** which requires rational planning and management of the activities to minimize the resources used in each part of the project.
- **Conscientiousness** which means that each member of staff must be conscious of his/her obligations as a professional technical consultant/staff member - towards the Client as well as towards the society.

To fulfil this policy, it is necessary that:

- Staff employed by the <Company Name> are qualified and the company ensures that their qualifications are kept up to date by providing targeted supplementary education.
- The company ensures that the staff assigned to each project task possesses adequate professional knowledge and task-related experience; and

- That the company specifies and carries out control of all services to ensure that the desired quality is obtained. Each employee shall also carry out thorough checks of his/her own work.

C. Quality Assurance of the Organization

The objective of the Quality Assurance is:

- to establish a documented framework for planning and following of the Quality Assurance activities to ensure that the objectives of the Organization are reached.
- Wherever noncompliance is reported to enable [86]management to execute the necessary corrective actions.

D. Overall Quality Assurance System

The project management and review are conducted through:

- Review of internal monthly reports, quarterly progress reports, inception reports, technical papers, and special reports. The Quality Control Team has the mandate to control and review written key outputs.
- Management visits.

Staff members

'Each staff member is required to conduct his own work with professional integrity and with due regard to the established systems and administrative procedures.'

Quality Audits

Quality Audits will be carried out to verify the implementation and effectiveness of the applied quality assurance, and the control of the organisation. Furthermore, the QA Audit will verify the implementation and the effectiveness of the control of the progress in work outputs.

E. Quality Assurance Operational Guidelines

- ### Each Member of Staff

All material produced by staff are subject to normal control with due regard to established systems and normal professional standards.

- **Finance/Accounts Manager**

The [87]Finance/Accounts Manager and the Partner shall carry out the initial QA on reports and work plans to ensure that the Draft version is finalized before submission to the rest of the [88]Management Team.

[86] Kindly change to the equivalent role in your business
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[88] Kindly change to the equivalent role in your business

- **Management Team**

All key documents and materials (reports and work plans) are read, checked, and approved by the [89]Management Team. The [90]Management Team can request a member of the Quality Control Team to review any material produced by the Sections/ Individuals.

The [91]Finance/Accounts Manager and the Partner will read, check, and approve the most important of the key documents and material. Comments will be submitted to the [92]Management Team. The [93]Finance/Accounts Manager and the Partner will receive QA notes from the Quality Control Team and submit the QA notes to the [94]Management Team.

- **Other Matters**

Standard reports and work plans, i.e., Monthly Management Report, Annual reports, and Technical Reports, will be prepared according to standard procedures as outlined in Table 4-1 (in the procedures).

These standard procedures can be disregarded in favour of more control and review if the [95]Management Team or the Projector Lead finds it appropriate. A flow diagram for QA of technical reports is shown in Figure 4-1 (in the procedures).

[89] Kindly change to the equivalent role in your business
[90] Kindly change to the equivalent role in your business
[91] Kindly change to the equivalent role in your business
[92] Kindly change to the equivalent role in your business
[93] Kindly change to the equivalent role in your business
[94] Kindly change to the equivalent role in your business
[95] Kindly change to the equivalent role in your business

Appendix 1: Standard Procedures For Reports Template

Table 3-1

Type of Report	Which Reports	Production, Approval and Submission of Reports
PROGRESS REPORTS	• Monthly Management Reports	• All submit their contribution to the [96]Partner
	• Quarterly Progress Reports	• The [97]Partner compiles the contributions into a comprehensive report, which is submitted to the [98]Management Team for approval
	• Annual Reports	• The [99]Management Team will discuss significant changes in individual elements with the relevant Section Heads before final approval.
	• Year End Report	• The report is approved by the [100]Partner and submitted to the [101]Managing Partner and the [102]Advisory Board

[96] Kindly change to the equivalent role in your business
[97] Kindly change to the equivalent role in your business
[98] Kindly change to the equivalent role in your business
[99] Kindly change to the equivalent role in your business
[100] Kindly change to the equivalent role in your business
[101] Kindly change to the equivalent role in your business
[102] Kindly change to the equivalent role in your business

Table 4-2

Type of Report	Which Reports	Production, Approval and Submission of Reports
TECHNICAL REPORTS	Outputs prepared by: • Staff • [103]Associate Consultants • International Consultants • [104]Work plans • Proposals • Progress Reports • Completion Reports • Assessment Reports	• Working Groups and individual consultants submit their contribution to the [105]Management Team through the [106]Partner • The [107]Partner will discuss significant changes in individual elements with the Management Team members before approval of draft. • If the Management decides that an output shall be subject to further evaluation, the output is submitted the [108]Non-Executive Partner for consideration and comments. • If necessary, the Non-Executive Partner will submit the output to the [109]Managing Partner • The [110]Management Team will communicate the results of the review to the producers of the output and ensure that appropriate corrections/adjustments are made in the output.

[103] Kindly change to the equivalent roles in your business
[104] Kindly change to the equivalent reports in your business
[105] Kindly change to the equivalent role in your business
[106] Kindly change to the equivalent role in your business
[107] Kindly change to the equivalent role in your business
[108] Kindly change to the equivalent role in your business
[109] Kindly change to the equivalent role in your business
[110] Kindly change to the equivalent role in your business

Appendix 2: Library Form Template

Books and Videos			
Title:		Date required by:	
Author/Editor			
Journal Articles			
Journal title		Date required by	
Article title:			
Article author(s):			
Journal Volume:	Issue:	Date:	Page(s):
Employee's Details and Copyright Declaration			
All requests MUST be work-related [111]**Name of Manager/Head of Dept. who the librarian can contact to verify this:** ________________________________			
I declare that I require this copy for research and study purposes connected with the work I do with <Company Name>. ***I also declare that an authorized officer of the library has not previously supplied me with a copy of this material.***			
Signature of requester:		Date:	
Name of requester:		Department:	
Phone:			

Appendix 3: Cash Advance Request Form Teplate

Employee Name:	**Expense Period - From:**

[111] Kindly change to the equivalent role in your business

ID:		To:
Manager Name:		Department:
Business Purpose		

DATE	DESCRIPTION	CATEGORY	COST (GH¢)
		SUBTOTAL	
		Less Cash Advance	
		Total Reimbursement	

Do not forget to attach receipt

____

___Employee Signature **Date**

____

___

Approval Signature **Date**

Appendix 4: Memorandum Receipt Template

Memorandum Receipt for Equipment		
Office / Org:	Address:	Date:
I acknowledge to have received from_________________________________ (Name of		

[112]**Finance Manager**) ______________________________ **the following property (ies) which will be used in** _________________________ **(office) and for which I am accountable.**							
QTY	UNIT	NAME & DESIGNATION	DATE ACQUIRED	PROPERTY NUMBER	CLASS NUMBER	UNIT VALUE	TOTAL VALUE
REMARKS:							
NAME: **SIGNATURE:**				POSITION:			

[112] Kindly change to the equivalent role in your business

Appendix 5: Property Issue Slip Template

FORM NO. ________ NO.______________				**PIS**		
PROPERTY ISSUE SLIP						
Name of Company/ Org: ____						
QTY	DESCRIPTION	DATE OF PURCHASE	PROPERTY NUMBER	CLASS NUMBER	UNIT VALUE	TOTAL VALUE

TRANSFEROR **I HEREBY CERTIFY that I have this ____day of _______,20_____** **ISSUED TO:** ______________________________ **(Name & Designation)** **(Office/Department/)** **the items/equipment described above** ______________________________ **([113]Finance Manager)**	**TRANSFEREE** CERTIFY that I have this ____day of _______,20_____ FROM: ______________________________ (Name & Designation) The above listed equipment for: (Office/Department) ______________________________ (Name & Signature of Receiving Officer)

Appendix 6: Gate Pass Template

[113] Kindly change to the equivalent role in your business

Company:

____

Mr./Mrs.: ____ Employee ID:

____

Department: ____ Date:

____

Allowed to take following items/equipment/ out/In form: ____________________ To:

____

Item Code	Description	Unit	Quantity	Remarks

Prepared by:	**Pass IN/OUT** **SECURITY IN CHARGE**
Received by:	

Appendix 7: Quality Assurance Report Template

SERVICE /STANDARD: ____

____

____

____

____

SURVEY PERIOD: ____

SURVEILLANCE METHOD (Check):

❒ Random Sampling ❒ 100% Inspection ❒ Periodic Inspection ❒ Customer Complaint

LEVEL OF SURVEILLANCE (Check):

❒ Monthly ❒ Quarterly ❒ As needed

PERCENTAGE OF ITEMS SAMPLED DURING SURVEY PERIOD: ______ %

ANALYSIS OF RESULTS:

Observed Service Provider Performance Measurement Rate: ______%

Service Provider's Performance (Check): ❒ Meets Standards

❒ Does Not Meet Standards

Narrative of Performance during Survey Period: ____________________________________

____

____

PREPARED BY: __________________________________

DATE:_______________________

Appendix 8: Standard Memo Format

Use the following standard memo template for most professional writing situations, including writing memos to the Managing Partner, heads of department, and Partners.

Memorandum

To: Recipients' names and job titles

From: Writers' names and job titles

Date: Complete and current date

Re: Description of what memo is regarding

Begin with a brief introductory paragraph that contextualizes the memo for your readers and describes the main point or course of action that readers should take after reading the memo. The introduction should not have a heading.

After the introductory paragraph, the body of the memo should be broken into sections with informative headings at the start of each section. These headings should not consist of generic words like "Problem" but specific phrases like "Avoiding Cost Overruns"

Remember that if there are others who will receive copies of the memo, aside from the recipients,

add **cc:** after the memo subject line with the names of those individuals.

Example of Memo to Co-workers

To: All Staff and Interns

From: [114]Priscilla Esinam Yevu, Partner

Date:

Subject: "Dishes in the Sink"

It has come to our attention that there has been a pile of unwashed dishes that accumulate in the sink by the end of each week. It has gotten so bad that washing one's hands in the kitchen sink become an uncomfortable undertaking. Therefore, we are introducing a new policy that mandates that employees wash their dishes as soon as they are done with them, keeping the sink clear for other uses.

If you do not have the time to wash your lunch container or coffee mug, leave it by your desk until you are ready to wash it. Even two or three dirty plates will encourage every person thereafter to leave their unwashed, food-stained dishes and silverware in the sink. Conversely, studies have shown that when a sink is empty, people are more likely to wash their dishes immediately.

Thank you for your cooperation!

Respectfully yours, OR

Cordially yours,

Priscilla Esinam Yev

[114] Kindly change to the equivalent name and role in your business

Partner

Appendix 9: Vehicle Request Form Template

GENERAL INFORMATION		
Department Name:		
Requestor's Name:		
Address:	Phone No:	
Email:		
VEHICLE USE		
Departure Date: **Time:**	Returning Date: Time:	
Approximate Mileage:	Number of passengers:	
Purpose of use (Be specific) And Destination		
Department Approval Signature:	Date:	
ADDITIONAL DRIVERS' INFORMATION		
Driver 1:	Signature:	Date:
Driver 2:	Signature:	Date:
VEHICLE CHECKOUT		
Gas Tank (Mark level): E '''''''1/2' ''''' 'F	Current Mileage/Distance:	
Any Exterior Body marks? YES **[] NO [ ] (If yes, indicate damage on attached body sketch sheet)**		
Interior Condition: Clean **[]** Dirty **[ ] (If dirty, be specific in the comments field below)**		
Comments		
OFFICE USE ONLY		
Approval:	Date:	
Debit:	Gas Credit:	
Gas cost:	Daily/Weekly charge:	
Mileage Credit:	Mileage Cost:	
Date of Departure:	Time:	
Date of Return:	Time:	

Miles driven:
Head of Transport: **Signature:**

Appendix 10: Meeting Expense Form

Date of Meeting:
Reasons for Meeting:

ATTENDEES

Attendee's Name

Item	Cost

JUSTIFICATION (Line item of budget)

____

I hereby certify that these expenses are directly related to the meeting for which the funds were awarded.

_______________________________________ _______________________________________

Signature ([115]Finance Manager) Date

[115] Kindly change to the equivalent role in your business

Appendix 11: Leave Form Template

Title:		**Name:**
Designation:		
Department:		
Reasons for Leave:		
Days:	From Date: ____ /____ /____To: ____ /____ /____	
Applicants Signature:		Date:
[116]**Manager's Remarks**		
Approved/Not Approved:		
[117]**Managing Partner's Signature:**		Dated: ____ /____ /____

Appendix 12: Internal Manpower Assistance Form Template

[116] Kindly change to the equivalent role in your business
[117] Kindly change to the equivalent role in your business

Date: ____ /____ /____		**Job Title:**		
Supervisor:		Department Number:		
Requested Start Date: ____ /____ /____		Quantity Needed:		How long needed(est.)?
Select one:	Regular	Seasonal		Temp Service
Will Report To				
Circle one:	New Position:	Special Project:		Replacement? (Who?)
Duties/ Any Particular or Unusual Requirements:				
Comments/Hiring Suggestions:				
		Approvals		
Dept. Head Signature			Date:	
Comments				
[118]**Human Resource Exec. Signature**			Date:	
Comments				
[119]**CEO's Signature**			Date:	
Comments				
		HUMAN RESOURCE DEPARTMENT		
Company Hire			Temp Service Hire	
Date Posted:			Name:	
Date offers accepted:			Bill rate:	
Name:			Actual Start Date:	
Start Date:			Temporary Service:	

[118] Kindly change to the equivalent role in your business
[119] Kindly change to the equivalent role in your business

Appendix 13: External Manpower Assistance Request Template

Job(s) title	Job(s) reference number	Application reference number (for <Company Name> use only)

Personal Contact details

Family name		Initials	
Present address		Contact, postal, or email address	
Telephone no.		Mobile no:	
Please state where you heard about this vacancy.			
[] <Company Name> colleague **[ ] Word of mouth** **[ ] Browsing <Company name>website** **[ ] Publication advert (please specify) ……………..** **[ ] Web advert (please specify) ………………** **[ ] Other (please specify) ……………………**			

Part 2 Job-related Information

Please note, this section of the form will be detached and given to the [120]Recruiting Manager and colleagues involved in the selection process. The Recruiting Manager and the selection panels will have access only to information contained in this section.

Job(s) title	Job(s) reference number	Application reference number (for <Company name>use only)

Personal Information

Family name	Initials

[120] Kindly change to the equivalent role in your business

Disability *(see guidance notes)*

Do you have a disability as defined in the guidance note?		Yes
		No
Regardless of whether you have a disability, do you require any adjustments to be made to facilitate your participation in the selection process? If yes, a member of Human Resources will contact you to ascertain how best to assist you.		Yes
		No

Employment and relevant work-related experience (covering no more than [121]10 years, starting with the most recent) *(see guidance notes)*

Date From/To	Role title, Employer
Summary of role and main achievements.	

Date From/To	Role title, Employer
Summary of role and main achievements	

Date From/To	Role title, Employer
Summary of role and main achievements.	

Date From/To	Role title, Employer
Summary of role and main achievements.	

Other relevant experience *(see guidance notes)*

Please give details of any additional **relevant** professional or other experience.

Relevant experience	Dates

Education/qualifications *(see guidance notes)*

Please give details of **relevant** educational and professional qualifications in chronological order.

[121] Kindly change to the equivalent duration in your business

Qualifications	Dates

Supporting statement

In support of your application, and referring to the role profile, please state succinctly, why you are suitable for this role, focusing on the **skills, knowledge, and experience** you bring *(see guidance notes).*

Supporting statement

Declaration

I declare that all the information I have provided in support of my application is, to the best of my knowledge and belief, correct and complete.

Warning: if you include any details that you know to be false or if you withhold relevant information, you may render yourself liable to disqualification from the recruitment exercise or, if appointed, to dismissal.

Your name	Date

Part 3 References and additional information

Additional information

When are you available to take up the job?	What length of notice must you give?
Please give details of your current/most recent remuneration package including salary, pension, and bonuses. Candidates will be asked for documentary evidence of this if appointed.	

References (*see guidance notes)*

1. Your current/most recent employer (or if no employer, your school/university/training provider).

Name and job title of referee		Name of referee's Organisation	
Postal address			
Email			
Telephone no		Mobile no	

Please indicate if this is a work or academic/training reference	☐	Work reference	☐	Academic/Training reference

2. Previous employer (or if no employer, your school/university/training provider).

Name and job title of referee		Name of referee's Organisation	
Postal address			
Email			
Telephone no		Mobile no	

Please indicate if this is a work reference or an academic/training reference	☐	Work reference	☐	Academic/Training reference

3. Previous employer (or if not applicable, a personal referee who knows you well and who is not a relative).

Name and job title of referee		Name of referee's Organisation	
Postal address			
Email			
Telephone no		Mobile no	

Please indicate if this is a work, academic/ training or personal reference	Work reference	Academic/ Training reference	Personal reference

Criminal Convictions (see guidance notes)

Have you ever been convicted of a criminal offence?	Yes [ ]	No [ ]	If yes, please give details below of the offence and the sentence imposed:

Part 3 References and additional information

Additional information

When are you available to take up the job?	What length of notice must you give?
Please give details of your current/most recent remuneration package including salary, pension, and bonuses. Candidates will be asked for documentary evidence of this if appointed.	

References (*see guidance notes)*

1. Your current/most recent employer (or if no employer, your school/university/training provider).

Name and job title of referee				Name of referee's Organization		
Postal address						
Email						
Telephone no				Mobile no		
Please indicate if this is a work or academic/training reference		☐	Work reference		☐	Academic/Training reference

2. Previous employer (or if no employer, your school/university/training provider).

Name and job title of referee				Name of referee's Organization		
Postal address						
Email						
Telephone no				Mobile no		
Please indicate if this is a work reference or an academic/training reference			Work reference			Academic/Training reference

3. Previous employer (or if not applicable, a personal referee who knows you well and who is not a relative).

Name and job title of referee		Name of referee's Organization	
Postal address			
Email			
Telephone no		Mobile no	

Please indicate if this is a work, academic/ training or personal reference	Work reference	Academic/ Training reference	Personal reference

Guidance Notes for completing application form

Part 1 - Personal Information

Data Protection

<Company Name> will use the information you provide in this form to process your application. If your application is successful and you take up employment with the <Company Name>, this form will be kept on your personnel file and some details from it will be held electronically by Human Resources Department in accordance with company policy. The <Company Name> will treat all personal details in accordance with Ghana law and its own privacy policy.

Part 2 - Job-Related Information

Disability

The <Company Name> on the Rights of Disabled People defines a disabled person as someone who has long-term physical, mental, intellectual, or sensory impairments, which in interaction with various barriers may hinder their full and effective participation in society on an equal basis with others.

It is <Company Name> policy to interview all applicants who are disabled and who meet the essential criteria for an advertised job.

Employment and relevant work-related experience

Please give details of your work-related experience covering no more than (number) years, or since leaving full-time education if this is sooner, starting with the most recent. Work-related experience can include voluntary work or other periods away from employment. It will not prejudice your application if you disclose a period out of formal employment (e.g., time spent at home bringing up children or a period of ill health).

Other relevant experience

This can include experience of volunteering, periods of travel, or of roles held within the community e.g. youth or community worker etc.

Education / qualifications

Please list only those qualifications specified in or related to the requirements listed in the person specification. If you have a qualification which is not directly relevant but which you feel demonstrates that you have a skill which is important to the job please list this under Other Relevant Experience saying why you think this is important.

Supporting Statement

The purpose of this section is to give you an opportunity to say why you are interested in the job and what you would bring to it. When writing your supporting statement please refer to the role profile and link your experience, qualifications, and interests to the requirements. Your supporting statement should be succinct and to the point. It will be used for shortlisting so please ensure you highlight the relevant skills, knowledge, experience, and qualifications you have relevant to the role. This can relate to the information listed earlier or you can give other examples.

Part 3 – Additional information, References, and Data collection

This part of the application form will be kept confidential and will only be seen by the Human Resources Executive.

References

Please provide [122]three (3) references. [123]One(1) from your most current/most recent employer and if possible [124]two(2) from previous employers. If you have no previous employer then please provide a reference from your school/university/ training provider and a personal reference from someone who knows you well but is not a relative. We will only contact referees if an offer of employment is made.

[122] Kindly change to the equivalent number in your business
[123] Kindly change to the equivalent number in your business
[124] Kindly change to the equivalent number in your business

Appendix 14: Purchase Requisition Form Template

PR No.__________

PART A

Requesting Department: ________________________ Date: ________________________

…….. CASH PURCHASE ………… PURCHASE ORDER (*Please check as applicable)*

Item #	Qty	Description/specification	Code	Purpose	Est. Price
TOTAL					

Items	Budget	Budget Provision GH¢	Accumulated Expenses GH¢	Balance Available	Justifications (If budget not available)

Deliver to:	Delivery date:

Requested by: _____________________ Signature: ________________ Date: __________________

Endorsed / Not endorsed (*please delete as applicable)*

Reason (s) if not endorsed: ____

Endorsing Officer: ________________ Signature: ___________ Date: ____________

PART B

INVITED QUOTATIONS

SUPPLIER	DATE RECEIVED	CONTACT PERSON & Phone No. (If Verbal)	COMPLIANT	PRICE	REMARKS

Quotations attached … not attached … (Please; as applicable)

Recommended supplier/contractor: ___________________________

Reason (s) if lowest bid not selected: ___________________________

Recommended by: _______________ Signature: _________________ Date: ___________

Approved / Not approved (*please delete as applicable)*

Reason (s) if not approved: ____

[125]Finance Manager: _______________ Signature: ________________ Date: ______________

Appendix 15:Travel And Meal Allowance Claim Form Template

Name:	Employee ID:

[125] Kindly change to the equivalent role in your business

Period/Duration:							
Date	Departure Time	Arrival Time	Details	Meal Expenses	Travel Expenses	Incidental (private accommodation)	Same-Day Travel
			TOTAL				

CLAIMANT'S CERTIFICATE

I certify that:

- I have not previously claimed this allowance for the above period.
- The travel for the above-mentioned period was for official purposes as defined in the <Company name>policy.
- I have not claimed actual costs for meals where a meal allowance has been claimed; and
- I have not claimed allowances for trips where the actual costs of meals or accommodation were met from another source.

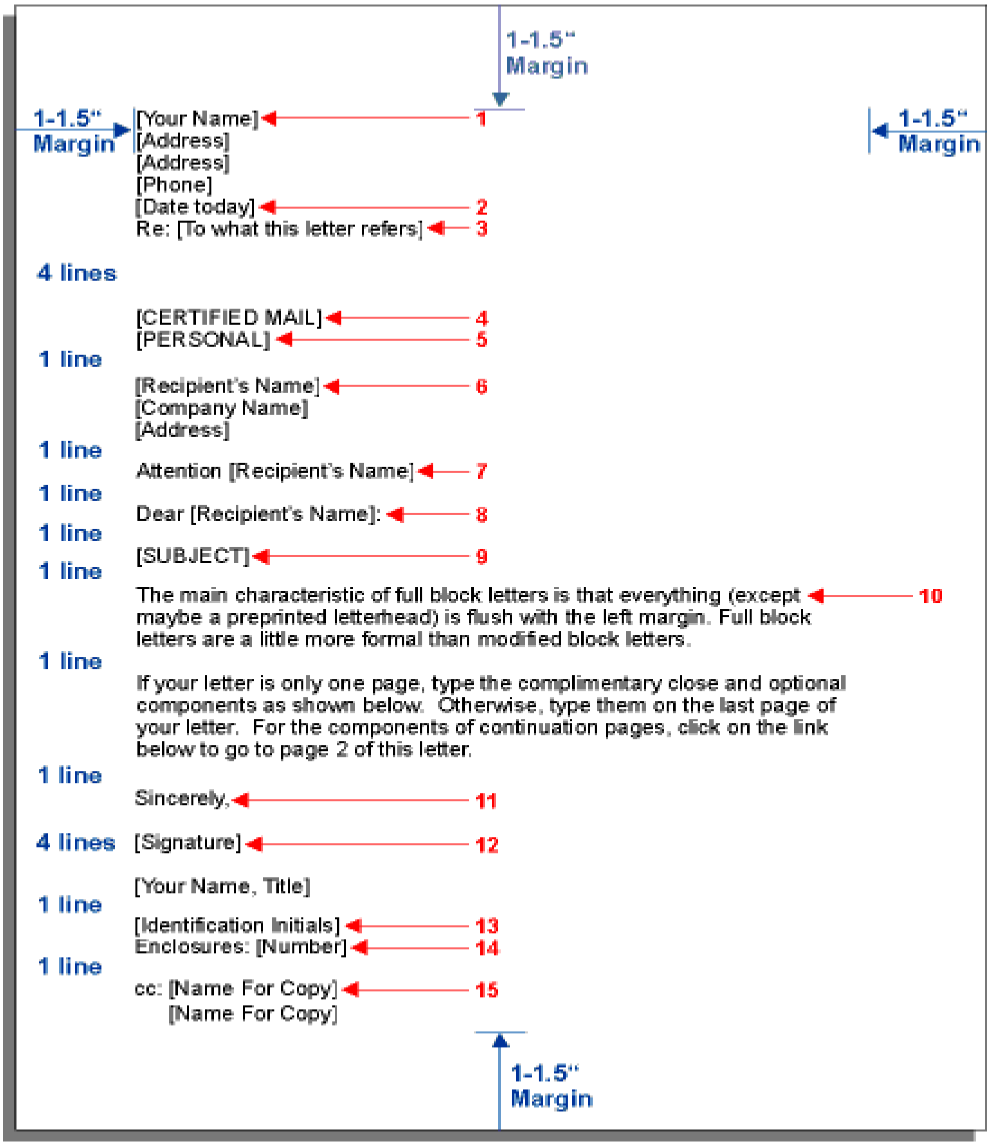
Claimant: ________________________________

Date: ____________________________________

APPROVAL OF EXPENDITURE **I certify that the officer has worked as stated above and accordingly I approve the claim** **Approving Officer:** **Date:**
NB: Attach • **Proof of overnight stay or hotel account and** • **Itemized receipts for any actual claims.**

Appendix 16: Standard Letter Format Template

This sample includes the formal components of full-block business letters. Some of these components are optional for typical, employment-related business letters.



Legend:

1. **Return Address:** Our stationery has a letterhead, so skip this.
2. **Date:** Type the date of your letter [126]two to six lines below the letterhead. Three are standard.
3. **Reference Line:** If the recipient specifically requests information, such as a job reference or invoice number, type it on [127]one or two lines, immediately below the **Date (2)**. If you are replying to a letter, refer to it here. For example,
   - Re: Job # 625-01
   - Re: Your letter dated 1/1/200x.
4. **Special Mailing Notations:** Type in all uppercase characters, if appropriate. Examples include
   - SPECIAL DELIVERY
   - CERTIFIED MAIL
   - AIRMAIL
5. **On-Arrival Notations:** Type in all uppercase characters, if appropriate. You might want to include a notation on private correspondence, such as a resignation letter. Include the same on the envelope. Examples are

[126] Kindly change to the equivalent number used in your business
[127] Kindly change to the equivalent number used in your business

- PERSONAL
- CONFIDENTIAL

6. **Inside Address:** Type the name and address of the person and/or company to whom you're sending the letter, three to eight lines below the last component you typed. [128]Four lines are standard. If you type an **Attention Line (7)**, skip the person's name here. Do the same on the envelope.
7. **Attention Line:** Type the name of the person to whom you are sending the letter. If you type the person's name in the **Inside Address (6)**, skip this. Do the same on the envelope.
8. **Salutation:** Type the recipient's name here. Type Mr. or Ms. [Last Name] to show respect, but don't guess spelling or gender. Some common salutations are
   - Ladies:
   - Gentlemen:
   - Dear Sir:
   - Dear Sir or Madam:
   - Dear [Full Name]:
   - To Whom it May Concern:
9. **Subject Line:** Type the gist of your letter in all uppercase characters, either flush left or cantered. Be concise on one line. If you type a **Reference Line (3)**, consider if you really need this line. While it's not necessary for most employment-related letters, examples are below.
   - SUBJECT: RESIGNATION
   - LETTER OF REFERENCE
   - JOB INQUIRY
10. **Body:** Type two spaces between sentences. Keep it brief and to the point.
11. **Complimentary Close:** What you type here depends on the tone and degree of formality. For example,
    - Respectfully yours (very formal)
    - Sincerely (typical, less formal)
    - Very truly yours (polite, neutral)
    - Cordially yours (friendly, informal)
12. **Signature Block:** Leave four blank lines after the **Complimentary Close (11)** to sign your name. Sign your name exactly as you type it below your signature. Title is optional depending on relevancy and degree of formality. Examples are
    - [129]Priscilla Esinam Yevu, Partner
    - John Bosco Zume, Consultant
    - Daniel A. Senyemi – Project Coordinator
13. **Identification Initials:** If someone typed the letter for you, he or she would typically include three of your initials in all uppercase characters, then two of his or hers in all lowercase characters. If you typed your own letter, just skip it since your name is already in the **Signature Block (12)**. Common styles are below.
    - JAD/cm
    - JAD:cm
    - clm
14. **Enclosure Notation:** This line tells the reader to look in the envelope for more. Type the singular for only one enclosure, the plural for more. If you do not enclose anything, skip it. Common styles are below.
    - Enclosure
    - Enclosures: 3
    - Enclosures (3)

[128] Kindly change to the equivalent number used in your business
[129] Kindly change to the equivalent names and roles in your business

15. **cc:** Stands for **courtesy copies** (formerly **carbon copies**). List the names of people to whom you distribute copies, in alphabetical order. If addresses would be useful to the recipient of the letter, include them. If you do not copy your letter to anyone, skip it.

Tips:
Replace the text in brackets [ ] with the component indicated. Don't type the brackets.

Try to keep your letters to one page but see page 2 of this sample if you need continuation pages.

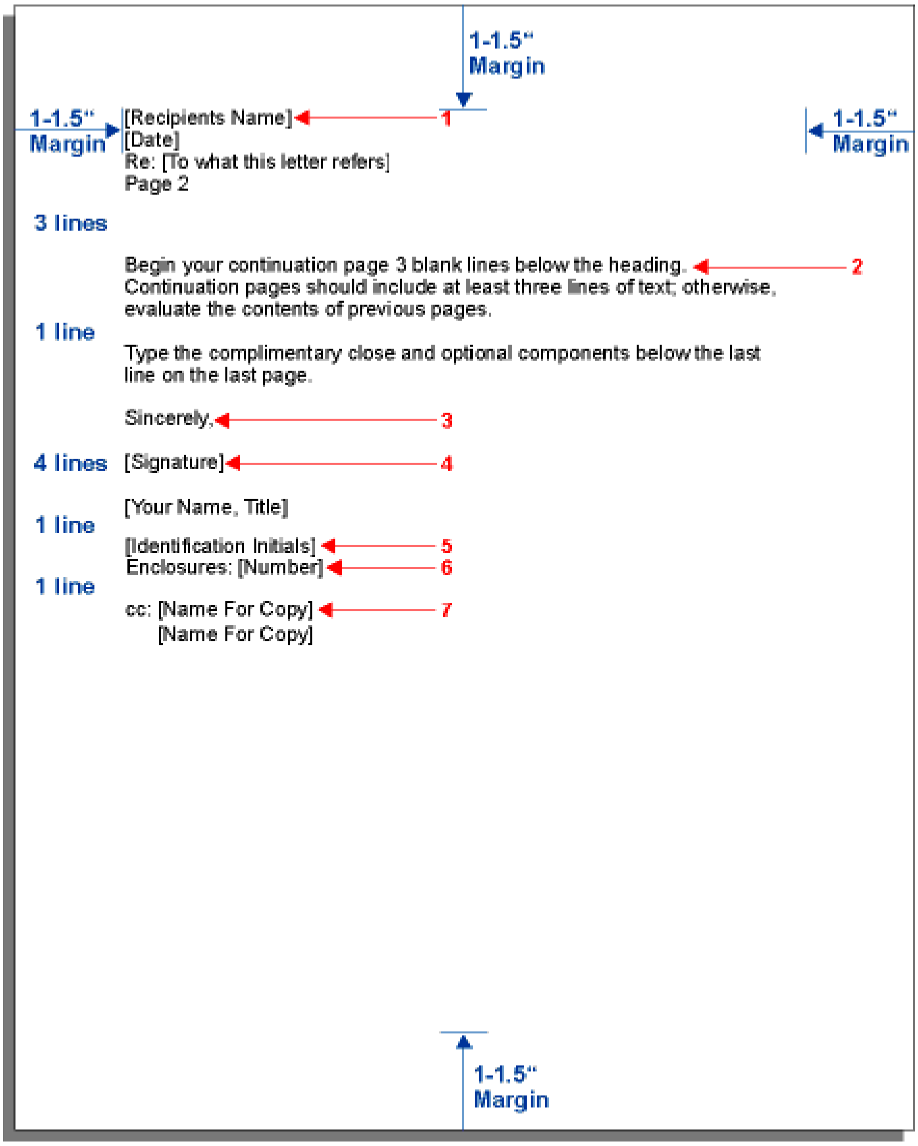
How many blank lines you add between lines that require more than one, depends on how much space is available on the page.

The same goes for margins. [130]One and one-half inches (108 points) for short letters and [131]one inch (72 points) for longer letters are standard. If there is a letterhead, its position determines the top margin on page 1.

- If you don't type one of the more formal components, don't leave space for them. For example, if you don't type the **Reference Line (3)**, **Special Mailing Notations (4),** and **On-Arrival Notations (5)**, type the **Inside Address (6)** four lines below the **Date (2)**

This is page 2 of the sample. It includes the formal components of modified block business letters.

[130] Kindly change to the equivalent used in your business
[131] Kindly change to the equivalent used in your business



Legend:

1. **Heading:** Type the recipient's name, **Date**, and **Reference Line** from page 1, and the page number. If you don't know the recipient's name, type the same thing as you did in the **Inside Address** on page 1; e.g., the company name.
2. **Body:** Type two spaces between sentences. Keep it brief and to the point.
3. **Complimentary Close:** What you type here depends on the tone and degree of formality. For example,
   - Respectfully yours (very formal)
   - Sincerely (typical, less formal)
   - Very truly yours (polite, neutral)
   - Cordially yours (friendly, informal)
4. **Signature Block:** Leave four blank lines after the **Complimentary Close (3)** to sign your name. Sign your name exactly as you type it below your signature. The title is optional depending on relevancy and the degree of formality. Examples are
   - [132]John Bosco Zume, Consultant
   - Daniel A Senyemi, Project Coordinator

[132] Kindly change to the equivalent names and roles used in your business

- P. E. Yevu – Partner

5. **Identification Initials:** If someone typed the letter for you, he or she would typically include three of your initials in all uppercase characters, then two of his or hers in all lowercase characters. If you typed it, just skip it since your name is already in the **Signature Block (4)**. Common styles are below.
    - JAD/cm
    - JAD:cm
    - clm
6. **Enclosure Notation:** This line tells the reader to look in the envelope for more documents. Type the singular for only one enclosure, plural for more. If you don't enclose anything, skip it. Common styles are below.
    - Enclosure
    - Enclosures: 3
    - Enclosures (3)
7. **cc:** Stands for **courtesy copies** (formerly **carbon copies**). List the names of people to whom you distribute copies, in alphabetical order. If addresses would be useful to the recipient of the letter, include them. If you don't copy your letter to anyone, skip it.

Tips:

- Replace the text in brackets [ ] with the component indicated. Don't type the brackets.
- Use letterhead only for the first page. Just use a blank sheet of paper for continuation pages.
- If you don't type one of the more formal components, don't leave space for them. For example, if you don't type the **Identification Initials (5)** and **Enclosure Notation (6),** type **cc: (7)** one blank line below the **Signature Block (4)**.

.