

9.06 Standards for Documents

Approved: 2018-03-08

Latest Revision Date: yyyy-mm-dd

Review required: 2022

<u>Intent</u>

To establish a consistent, recognizable and professional appearance for SBOA documents.

Policy and Procedures

SBOA documents are prepared in standard formats and meet common business conventions.

Letters are produced in block format (the entire text is left aligned and single spaced, except that there is a double space between paragraphs instead of indents for paragraphs), on SBOA letterhead (see below) that includes return mailing address and website URL. The writer signs the letter above a signature block that includes SBOA title and contacts. The signature may be a digital version. Letters are issued in PDF format.

Email messages between Directors, Executive Secretary and committee members are considered internal communications. The typical message header format provides the same information as a traditional memo, so a signature block and other identification is not required, but may be added if desired.

However, all other email messages are considered external communications and must include a signature block (see below) plus the SBOA logo and contact information and a confidentiality warning at the bottom of the message. In addition, all email messages to members and/or mailing lists must include an unsubscribe link which opens a reply message for them to complete and submit. (See 1.06 Privacy and Protection of Personal Information and 7.02 Communication Methods.)

When a person clicks on the unsubscribe link at the bottom of an email message, a return message to SBOA is opened that is pre-populated with a message that members may unsubscribe from promotional and informational messages from SBOA, but that such messages that are required by the bylaws and applicable legislation will still be sent. The members must enter information as required and submit the message to be unsubscribed.

Other documents such as fax cover sheets, memo, reports should be tailored as appropriate, remembering that external documents should be labeled with the SBOA name and logo, and usually contact information.

Application

All persons sending letters and email messages that represent SBOA.

Notes

Based on information from online sources.

Samples

Letter Header



Signature Block

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Email Notification

This message and any attached files are intended only for the use of the addressee(s) and may contain confidential and/or privileged information. If you have received this message in error or are not the intended recipient(s), please notify the sender immediately by reply email, refrain from viewing, forwarding or printing the message, and permanently delete the original message and attached files. Thank you.

unsu<u>bscribe</u>

Document Header

