Headquarters
Department of the Army
Washington, DC
15 September 1996

*DA Memo 25-52

STAFF ACTION PROCESS AND CORRESPONDENCE POLICIES

Applicability. This memorandum applies to Headquarters, Department of the Army (HQDA) and its field operating agencies (FOAs). The term Headquarters, Department of the Army includes both Secretariat and Army Staff (ARSTAF) agencies.

Proponent and exception authority. The proponent of this memorandum is the Administrative Assistant to the Secretary of the Army. The Administrative Assistant has the authority to approve exceptions to this memorandum which are consistent with controlling law and regulation. The Administrative Assistant may delegate this authority in writing to a division chief within the proponent agency in the grade of colonel or civilian equivalent. Users are invited to send comments and suggested improvements to the Director, Executive Communications and Control, 200 Army Pentagon, Washington DC 20310-0200.

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*This DA Memorandum supersedes DA Memo 340-15, 15 June 1988.

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1. Purpose.

This memorandum prescribes principles and procedures for the Staff Action Process at Headquarters, Department of the Army. Agency supplementation of this memorandum is not required.

2. References.

a. AR 1-9, White House Liaison, Communications, and Inspections.

b. AR 1-20, Legislative Liaison.

c. AR 10-5, Headquarters, Department of the Army, Organization and Functions.

d. AR 25-11, Record Communications and the Privacy Communications System.

e. AR 25-50, Preparing and Managing Correspondence.

f. AR 25-55, The Department of the Army Freedom of Information Act Program.

g. AR 380-5, Department of the Army Information Security Program Regulation.

h. DA Memo 1-1, Briefing the Secretary of the Army, Under Secretary of the Army, Chief of Staff, Vice Chief of Staff, and Director of the Army Staff.

i. DA Memo 10-7, Relationships Between the Office, Secretary of the Army and the Army Staff.

j. DA Memo 11-2, Consultation with State and Local Officials.
k. DA Memo 105-1, Communications-Electronics, Staff Communications.

l. DA Pamphlet 310-20, Administrative Publications: Action Officers Guide.

m. General Order 12, Assignment of Functions, Responsibilities and Duties within the Office, Secretary of the Army.

n. OSD Administrative Instruction No.7

o. Congressional Actions Responsibilities SOP.

3. Staff Relationships.

a. Relationships between HQDA agencies, Office of the Secretary of the Army (OSA), Office of the Chief of Staff, Army (OCSA), and Office of the Secretary of Defense (OSD) are described in detail in DA Memo 10-7 and are characterized by an extensive network of informal information channels. Direct coordination and exchange of information among all echelons is essential in assuring well-integrated staff work. Functions, duties and responsibilities within the OSA and the Secretariat are described in General Orders 12 and in AR 10-5 for the OCSA and the ARSTAF.

b. The Director of the Army Staff (DAS) and the Administrative Assistant to the Secretary of the Army (SAAA) are responsible to the Secretary of the Army (SA),

Chief of Staff, Army (CSA), Under Secretary of the Army (USofA), and Vice Chief of Staff, Army (VCSA). They direct staff efforts in all Army matters, except Joint Chiefs of Staff (JCS) actions, and coordinate the activities of all agencies reporting to the SA and CSA. The DAS and the SAAA normally exercise this responsibility through the Director of Executive Communications and Control (DECC) and the Assistants to the Director of the ECC (ADECC), who are the principal points of contact between OSA and OCSA and the HQDA staff.

c. All HQDA staff actions forwarded to the SA, CSA, USofA, VCSA, or DAS will be processed through the appropriate ADECC except those actions prepared by the Technology Management Office, Congressional Activities Division and the Chief of Staff's Staff Group; actions pertaining to general officers originating in the General Officer Management Office (GOMO) and other sensitive actions such as selection board documents and certain Inspector General (IG) or legal correspondence will report directly to the appropriate authority. Forward Joint Actions through the Joint Actions Control Office (JACO) in Room 3E633.

d. The ADECCs assigned to the Executive Communications and Control Office (ECCO) maintain close liaison with those HQDA agencies with whom they work. They ensure that staff actions are responsive to SA, CSA, USofA, VCSA, DAS, and SAAA. They are expediters of queries, information papers, briefings, and relaying instructions and information to the HQDA staff in the name of the SA, CSA, USofA, VCSA, DAS, and SAAA.

4. Staff Action Procedures.

a. Briefings. Prepare briefings to the SA, CSA, USofA, VCSA, or DAS in accordance with DA Memo 1-1 (5 Nov 91). Action officers will coordinate with the appropriate ADECC to schedule a briefing and to determine the recipient, length and attendees.

b. Completed staff actions. Actions will be completed and fully coordinated within specified suspenses. An extension, if necessary, should be requested from ECCO prior to the original suspense date. Paragraph 4f contains detailed information on coordination and paragraph 4i and appendix D contain detailed instructions on suspenses.

c. Resources. Manpower, finance, or other resource implications must be fully

addressed.

d. General Staff Action Process. Appendix A provides the General Staff Action Process and other appendices provide the specific processes to follow when preparing responses for the signature of principals.

e. Priority actions.

(1) Correspondence. Correspondence to the Secretary or Deputy Secretary of Defense from Senior White House staff, cabinet members, members of Congress, state governors and other correspondents will receive personal replies from the SECDEF or DEPSECDEF unless otherwise directed by OSD Correspondence and Directives. Such correspondence is held to a strict and short suspense. Contact ECCO immediately if an action has been misdirected.

(2) White House correspondence (see AR 1-9). All written and telephone contacts with the White House will be coordinated with the White House Liaison Office (WHLO) (see app M).

(3) Congressional correspondence (see AR 1-20).

(a) All correspondence to Members of Congress will be coordinated with Office of the Chief of Legislative Liaison (OCLL), OSA.

(b) Of particular concern are cases of "compassion" or time-sensitive in nature, such as death, injury, sickness, or other grave circumstances affecting service personnel and members of their families.

(4) Priority OSA staff action (see DA Memo 10-7). Normally ECCO will assign a HQDA staff agency the lead for a formal action that involves major policy or that may result in a substantially increased activity for an agency. However, an action that requires an immediate response may be tasked directly to an agency by OSA or OSD. An information copy of the tasker should be furnished ECCO concurrently. An action officer tasked directly by OSA or OSD will notify ECCO when:

(a) An action has major policy implications or requires substantial increase in workload.

(b) An action appears to conflict with earlier guidance.

(5) Consultation with state and local officials. Staff actions involving major policy, budget, or reorganization proposals which have significant state and local impact will follow procedures as prescribed in DA Memo 11-2.

f. Coordination. All required coordination must be completed before an action is given to the ADECC. Consultation or discussion does not imply concurrence.

(1) Judgment must be exercised to ensure that informal coordination does not presume SA, CSA, USofA, or VCSA's decision or position.

(2) It is the responsibility of the lead staff agency to coordinate assigned staff actions with all applicable HQDA agencies, MACOMs and with appropriate OCSA, OSA, and OSD elements. Early coordination with established points of contact (POCs) is required to obtain first-hand guidance and preclude last minute nonconcurrences, rewrites, and delays. Offices with which a paper is coordinated will be informed of any major changes made by the decision maker.

(3) Coordination should be initiated informally by face-to-face contact, by telephone, electronic mail, working draft, etc. Early contact with all parties including OSD and major Army commands (MACOMs) is encouraged. Coordination by conference, including teleconference when the parties are physically separated, may be used when complex issues are being addressed. However, the final action should reflect the name, position, and office level at which coordination was accomplished.

(4) Coordination and comments will show official positions only, not personal opinions.

(5) Concurrences will not be assumed. If no response is received or an extension is required, initiate follow-up action telephonically to verify the agency's position (whether the agency concurs or nonconcurs). A line-thru is not an indication of concurrence or nonconcurrence unless the individual lining through specifically indicates so in writing.

(6) The term "noted" is an annotation used to indicate review of an action which requires no substantive comment or coordination. When used by action officers, it reflects only that the specific paper has been seen and connotes neither concurrence nor nonconcurrence.

(7) Terms such as "noted" or "no staff interest" will not be used on final action papers, except by the Office of the Inspector General or other special staff agencies who have reason to "note" actions. If an agency does not have interest in the action, it should be determined in the early stages of coordination.

(8) Agencies will avoid "concur with comments" in the final coordination. Appropriate comments should be made in early staffing only. Final coordination should reflect concurrence or nonconcurrence.

(9) A nonconcurrence is a separate act and requires a formal statement. Nonconcurrences should be resolved when possible. Should an agency continue to nonconcur with an action that does not have to go to the SA, CSA, USofA, VCSA, or DAS, the lead agency head may override the nonconcurrence if it is wholly within that agency's functional area and there is no direct impact on other agencies. It is the responsibility of the action officer to present to the agency head the reasons for and consideration of the nonconcurrence. When a nonconcurrence involves functional responsibility not wholly within the purview of the action agency or when the nonconcurrence involves two or more functional areas, reasons for the nonconcurrence, consideration of the nonconcurrence rationale and recommendations will be forwarded to the SA, CSA, USofA, VCSA, or DAS for decision as appropriate.

(10) Avoid implying the personal review of an agency head unless that official actually conducts the review. The term "ODCSLOG" indicates office coordination whereas "DCSLOG" connotes the personal review of the agency head. Action officers will furnish their name, rank, and office symbol when coordinating on an action.

(11) Heads of ARSTAF agencies will ensure that actions to be lined-thru or signed personally by the CSA or VCSA are coordinated in final with appropriate OSA elements.

(12) Lateral direct coordination and tasking between staff agencies is authorized. The agency establishing suspense dates during coordination will ensure that reasonable time is given to accomplish the action. Agencies will respond by the suspense date given or negotiate an extension with the tasking agency.

g. Delegation of authority.

(1) Authentication authority. Judgment must be exercised to ensure that actions of special interest are forwarded to the SA, CSA, USofA, VCSA or DAS, as appropriate (see appendix B).

(2) General policies.

(a) The President will not be referred to in any manner which implies his personal connection with a specific policy or official action.

(b) The phrase "Army position" may be used in oral or written communications only when the SA, CSA, or individuals delegated this authority by the SA and CSA, approve that position.

(c) Officials in OCSA, OSA, and OSD may be quoted in written communications only if the official being quoted or officials to whom this authority has been delegated personally review both the content and specific use in the text.

(d) Line-thru authority is approval authority and is used to limit the number of administrative levels. Line-thru authority will be exercised on routine actions and on those actions which officials listed at appendix B determine need not be forwarded to the SA, CSA, USofA, VCSA, or DAS for review. Inherent in delegation of line-thru authority is the responsibility to ensure that the action has been fully coordinated and reflects completed staff work.

(e) In keeping with the emphasis on decentralization and delegation of authority, a HQDA agency normally will be given complete responsibility for an action within its functional area.

(3) Officials in OSD.

(a) In responses on behalf of the Secretary or Deputy Secretary of Defense, the following standard opening is: "This is in reply to your (date) letter to Secretary_____ (or Deputy Secretary_____) regarding...." The statement "The Secretary of Defense (or Deputy Secretary of Defense) has asked that I respond to your letter" will not be used without specific instructions nor will a closing authority line be used without such instructions.

(b) When quoting the source of authority for policies or actions of the SECDEF and the assistants, reference will be made to the office or position from which the authority derives, not the official.

(4) Officials in OSA.

(a) General Orders 12 describes the delegation of authority to act for the Secretary of the Army.

(b) When responding on behalf of the Secretary of the Army, open with "This responds to your (date) letter to the Secretary of the Army concerning ....." If the date on incoming letter is over 30 days old, consider using "recent" instead of the actual date.

(c) Use the statement "The Secretary of the Army (or Secretary _____) has asked me to respond to your letter (or memo)" only when specifically instructed to do so by the SA.

(5) Officials in OCSA.

(a) AR 10-5 describes the delegation of authority to act for the CSA. Heads of staff agencies and designated individuals are delegated authority to take final action for the CSA on all subjects within their functional areas, except for those areas in which the CSA or VCSA has expressed personal interest.

(b) When responding on behalf of the CSA, open with "The Chief of Staff has asked that I respond to your letter of (date)_____ since the subject you addressed is within my area of responsibility."

(c) Closing authority lines are not used on letters and memorandums signed by the SA, CSA, USofA, VCSA, and DAS.

(d) Correspondence originated for the SA by an ARSTAF agency or ARSTAF Field Operating Agency (FOA) requires a "Thru Chief of Staff, Army" line in the address. Other thru addressees, such as the VCSA, are not required. The ECCO will route the action thru the DAS and VCSA as appropriate.

(e) Heads of HQDA agencies should delegate their signature and coordination authority to the lowest level possible consistent with the following:

1 Correspondence that will be seen personally by the SA will be hand carried to ECCO. The appropriate ADECC will prepare a "whitetail" summary coversheet, which will be initialed by the CSA, USofA, VCSA, SAAA or DAS as appropriate.

2 Correspondence seen personally by the SA, CSA, USofA, VCSA, or DAS must show signature, line-thru, or initial of the agency head or principal assistant.

3 The DAS may line-thru for the CSA on correspondence addressed to

Secretariat elements, but not on correspondence addressed to the SA. A copy of all lined-thru actions should be forwarded to ECCO.

4 Correspondence of departmental significance that transmits an "Army position," and is sensitive in nature, or responds to inquiries from senior State or Federal government officials, or that is addressed to OSD, or other departments or agencies should be signed by an agency head, director, or ASA. Judgment must be exercised in determining appropriate involvement of the SA, CSA, USofA, VCSA, or DAS. In general, correspondence should be signed at a level that is commensurate with the correspondent or with the nature of the action, as appropriate.

5 Line-thru actions will clearly show the organization and position (by stamp or printed annotation) so that the addressee will know the routing process.

6 Care should be taken to ensure that actions are seen by an "agency chief" somewhere in the process and do not become purely executive officer actions.

h. Identification and control of taskings.

(1) The SAAA has the authority to task the Secretariat Staff (see app B). The DAS has the authority to task the ARSTAF (see app B). They normally exercise this authority through the ECCO. Routine requests for information, coordination or data calls may be initiated by HQDA staff agencies without going through ECCO.

(2) The ADECC's in ECCO will ensure that responses to taskings are complete, properly formatted and assembled, alternatives have been considered, and appropriate coordination is reflected to include the name or position of responding agency. Responses that do not meet these criteria will be returned for corrective action.

(3) The HQDA Tracking System will be used by the ECCO when suspense control is required to task a specific HQDA Staff agency.

(4) Memorandums may be used to address Secretariat heads when providing interim guidance, informal taskings, or information of a short-term nature and signed by the SA, USofA, or their respective executive officers or military assistants.

(5) Memorandums may be used to address ARSTAF heads when providing interim guidance, informal taskings, or information of a short-term nature and signed by the SA, USofA, CSA, VCSA, DAS or their executive officers or military assistants.

i. Suspense system. Detailed procedures for establishing suspense dates are at appendix D. The suspense system must have sufficient flexibility to balance the need for responsiveness with the need for complete staff action. Procedures for extending suspenses are also discussed in appendix D. If a suspense cannot be met for an action that is going outside HQDA, an interim response should be sent prior to the original suspense date and an extension requested. For actions controlled by ECCO, a copy of the interim response must accompany the request for extension. The ADECC will notify HQDA agencies of short suspense actions as soon as possible after receipt. Actions with very short suspenses will be handcarried or sent electronically:

(1) Cases received from OSD for signature of the SECDEF or DEPSECDEF. Extension of these suspenses are rarely permitted. If compelling reasons dictate, submit a request for extension on SD Form 391 and coordinate the request with ECCO. The DECC must sign all SD Form 391's to OSD. The suspense date is the date the action is due in the OSD Correspondence and Directives, room 3A948.

(2) Cases received for signature of OSA principals:

(a) For SA signature, if a suspense cannot be met, HQDA agencies will notify ECC and the Senior Military Assistant to the SA immediately and furnish an interim response for SA signature or, if approved by the Senior Military Assistant, for staff principal's signature. The Senior Military Assistant to the SA may grant, through DECC, an extension when justified and mutually arranged.

(b) A suspense imposed by the USofA or an Assistant Secretary of the Army. Army elements will check with the appropriate executive officer regarding an extension.

(3) Cases received from the Under Secretaries of Defense, Assistant Secretaries of Defense, and other OSD offices. Direct contact with the appropriate OSD office is authorized if an extension is required. Appropriate control points (ECCO, SACO) will be notified of any extension granted by OSD.

j. Signature documents.

(1) Documents for signature of key officials in the Secretariat and OCSA will be prepared in final form.

(2) When forwarding documents for signature, use a readily identifiable marker (e.g. removable signature arrow or DA Label 116) to show the signature block of the SA, CSA, USofA, VCSA, or DAS.

(3) Place documents for signature behind the first tab of a packet.

(4) Do not staple packets that contain correspondence for signature.

(5) All documents forwarded to OCSA for information or action will reflect paragraphing per AR 25-50. Follow guidance contained in appendix E when forwarding documents to OSA for information or for signature.

k. Transmittal.

(1) Correspondence prepared for officials in the Office of the Secretary of Defense. For correspondence requiring SECDEF or DEPSECDEF signature, use a short, concise information or action memorandum as the transmittal document (see figure G-1 and G-2). The discussion section should contain information not in the proposed correspondence for signature. The coordination section should identify the OSD coordination accomplished or state that none is considered necessary. It will also state concurrence or nonconcurrence of interested OSD departments or agencies, SECDEF or DEPSECDEF correspondence, obtained from department or agency heads concerned, or their deputies. Enclose the original of each OSD concurrence or nonconcurrence at the final tab behind the information or action memorandum for SA's signature.

(2) Correspondence prepared for officials in the Office of the Secretary of the Army. The ARSTAF will use memorandums unless specific guidance is given to the contrary. Secretariat principals may use informal memorandums. See appendix E for guidance on correspondence for SA's signature.

(3) Correspondence prepared for officials in the Office of the Chief of Staff. See appendix F for guidance on correspondence for CSA signature.

5. Correspondence Policies.

a. Guidance. AR 25-50 applies to all correspondence unless supplemented by this memorandum.

b. Writing style. Style procedures are as follows:

(1) Deal in specifics, not generalizations.

(2) Convey an expedient and concerned reply.

(3) Convey that all alternatives have been explored.

(4) Identify and emphasize any controversial material.

(5) Avoid the appearance of a "form letter" reply or a fill-in-the-blank response.

(6) Write in the active voice ("We thoroughly researched this problem") rather than passive ("This problem was thoroughly researched").

(7) Avoid military or colloquial jargon.

(8) Avoid acronyms and abbreviations whenever possible. If used, preface with complete title or phrase to which the acronym or abbreviation refers followed by the acronym in parentheses.

(9) Use simple language, brief sentences and paragraphs (see app H).

(10) Address each issue raised in the incoming correspondence.

(11) Avoid repeating words or ideas, minimize use of modifying language and be straightforward.

c. Letters versus memorandums. (Refer to AR 25-50).

(1) Use letters when responding to any inquiry received in letter format or corresponding with individuals or agencies outside the Department of Defense.

(2) Use memorandums when:

(a) Preparing correspondence for the SECDEF or DEPSECDEF to the President, senior White House staff members, or the Secretary of State.

(b) Transmitting correspondence prepared for signature of OSD (below SECDEF or DEPSECDEF), OSA, or OCSA officials. (Use OF 41 if correspondence is from one OSA official to another).

(c) Responding to any inquiry received in memorandum format.

(d) Corresponding within the Department of Defense.

(3) Use Information or Action Memorandum format when--transmitting correspondence (signature items) or information to the SECDEF or DEPSECDEF (See pages G-3, G-4).

d. Final form versus draft.

(1) Correspondence for the signature of officials in OSA and OCSA will be submitted in final form on appropriate stationery available in the Army Publication Branch, Room 1D619.

(2) Pen and ink changes are encouraged on all internal Army correspondence including that addressed to SA or CSA. Pen and ink changes are not acceptable on correspondence prepared for signature of OSA or OCSA principals or on correspondence addressed outside the Department of the Army.

e. Visual appearance.

(1) Specific guidance for letter, memorandum, and information and action memorandum formats is contained in appendix I. Professional courtesy demands that all correspondence be visually appealing as well as clearly written and timely.

(2) In general, large type is easier to read. All correspondence addressed to civilian officials signed by the SA, CSA, USofA, VCSA, or DAS, and for all correspondence signed by the SECDEF should be prepared with 12 point pitch and Arial or comparable font.

(3) Do not use full or right-justified margins.

(4) A spreadsheet may be used to present complex and essential matters in matrix form to help the recipient understand the issues, points of difference, reasons for changes, and basis for accepting or rejecting alternative courses.

(5) Office symbols will not be typed on original correspondence for signature of OSD officials nor on correspondence for SA, CSA, USofA, or VCSA signature. However, office symbols may be used on correspondence for DAS signature. The agency preparing the correspondence will use its office symbol on all file copies unless otherwise instructed.

6. Dating Correspondence.

a. Do not date correspondence prepared for signature of OSD, OSA, or OCSA officials. It will be dated when signed.

b. See appendix I for guidance on dating memorandums and letters.

c. Use the military date (day, month, year) 1/ or civilian date (month, day, year) 2/, as indicated below, when using a date in the text:

(1) Use civilian date on all correspondence to OSD, regardless of the intended reader.

(2) Use civilian date on all correspondence to non-DoD individuals, regardless of origin (ARSTAF, Secretariat, or OSD).

(3) Use civilian date on all correspondence for signature of SA, USofA, or an ASA-level official.

(4) When in doubt, use the format with which the reader is most likely familiar or the format used by the intended reader.

d. Dates used in the text should be written in the same format as the date on the correspondence.

(1) The format for military dates is "day, month, year/" For example 31 March 1995.

(2) The format common to civilians in the U.S. is "month, day, year." However, in other countries the format may differ. For example, in Europe and Asia, the common format is "day, month, year." Use appropriate format when preparing international correspondence.

APPENDIX A

STAFF ACTION PROCESS

Action Source Internal - OCSA - OSA - OSD	o Initial guidance normally included.
Obtain guidance	o Know what the requirement is. o Direct contact with action source is encouraged. o Differentiate between personal opinion and official position. o If required, seek guidance any time during staff action process.
Check for suspense	o If action initiated by OCSA or OSA or OSD and suspense cannot be met, contact DECC.
Collect and analyze data	o Check background file. o Discuss with experienced action officers.
Prepare draft for coordination	o Maximize use of working draft for coordination.
Execute intra-agency coordination	o Prepare papers in memorandum or letter format. o Determine who will sign action. o Coordinate with OSA or OCSA (via DECC) early. o Assure necessary coordination.

	o Maximize use of telephone and handwritten notes.
Revise draft as necessary	o Avoid wordsmithing (i.e., changing "glad" to "happy"); however, ensure that correspondence is clear, concise, and well-written.
Execute interagency coordination	o Use original draft for markups.
	o Use most informal method, but identify official who accomplished the review in each agency.
	o Ensure final coordination is rendered by appropriate level of official.
	o Lateral coordination as required.
	o Further OCSA or OSA coordination as required.
	o Contact with MACOM counterpart encouraged.
Revise draft as necessary and complete	o Resolve nonconcurrences if possible.
Take final action/Forward for approval	o Agency head or designated individual takes final action.
Forward for resolution of nonconcurrence	o Agency head-- -- Overrides nonconcurrences. -- States reasons for nonconcurrence and rationale for consideration and recommendations. Forward to SA or USofA or to CSA or VCSA for decision.
	o If necessary for paper to be approved above agency level, agency head will forward to OCSA or line-thru for CSA and forward to OSA.

Staff Action Process on Correspondence Prepared for SECDEF or DEPSECDEF signature

1. Coordinate action informally with OSD elements; list such coordination in the ACTION MEMORANDUM to the SA. If action is going to SECDEF or DEPSECDEF for final action, see paragraph 4, below.

2. Prepare the suggested response for SA signature (see appendix F for further guidance); prepare ACTION MEMORANDUM; deliver to the appropriate ADECC, room 3D652.

3. After SA signs, ECC will date and contact action officer for pickup and delivery to OSD.

4. On correspondence to SECDEF or DEPSECDEF, coordinate formally with OSD principals or principal deputies and other Services as appropriate. List names (with signature or initials), offices, and dates of formal coordination on separate sheet (as shown below) and attach to ACTION/INFORMATION MEMORANDUM as the last tab.

FORMAL COORDINATION

PRINCIPAL ASSISTANT SECRETARY OF DEFENSE

NAME	DATE	PHONE NO.
Assistant Secretary of Defense (P&L) (Production and Logistics)		

5. Return complete, formally coordinated package with three copies to ECC for processing.

6. The action officer or ECC will deliver action to OSD for signature. Correspondence submitted to the SECDEF, DEPSECDEF, and Executive Secretary shall be delivered to room 3A948; deliver correspondence for other OSD officials to that individual's office.

7. After OSD signs, ECC will distribute file copies.

APPENDIX B

TASKING AND AUTHENTICATION AUTHORITY

1. The Administrative Assistant to the Secretary of the Army (AA), the senior civilian career official, is the principal advisor to the SA for the administration of DA and is responsive to other principal officials within the Army Secretariat. Officials listed below subject to the direction and control of the SA are hereby authorized and directed to act for the SA within their respective fields of responsibility as set forth in HQDA general orders, AR 10-5, and as further directed by the SA.

a. Under Secretary of the Army

b. Assistant Secretaries of the Army

c. General Counsel of the Army

d. Administrative Assistant

e. Director of Information Systems for Command, Control, Communications, and Computers

f. The Inspector General

g. The Auditor General

h. Deputy Under Secretaries of the Army

i. Chief of Legislative Liaison

j. Chief of Public Affairs

k. Director, Office of Small and Disadvantaged Business Utilization

2. The DAS acts in the name of the CSA and VCSA to exercise directive authority over the ARSTAF and to coordinate the activities of all agencies reporting to the CSA. Authority to disapprove recommendations of ARSTAF agency heads is reserved for the CSA, VCSA, or DAS acting in the name of the CSA.

APPENDIX C

EXECUTIVE SUMMARY (EXSUM)

1. An EXSUM provides timely information in a brief, succinct manner. They are stand alone documents and, therefore, will not be submitted with attachments. Whenever possible, this format should be used instead of the full information paper or information memorandum. Unclassified EXSUMs can be sent to the CSA via E-MAIL. Ensure the ADECC receives a copy of all EXSUMs E-MAILED to the CSA.

2. Use the EXSUM to transmit information to the SA, USofA, CSA, VCSA, and DAS. If a complete paper is desired, DECC will inform the responsible staff agency. This procedure is not meant to replace all information papers. There will always be subjects the Staff agency heads believe will need a full explanation.

3. Memorandums or EXSUMs, whether for decision or information, which respond to an OSA or OCSA tasking will show the tasking control number in the lower right corner of the memorandum or EXSUM. This allows the appropriate ADECC to clear the suspense with the Correspondence Records Division (CRD). Failure to indicate the control number may result in needless search for a suspense action already completed. The tasking control identification number is found in the upper left portion of the tasking control document (i.e. 60501203).

4. General format (page C-2). An EXSUM should be one paragraph, marked with the appropriate classification. A separate classification marking for the title is also required. EXSUMs will not exceed 15 lines. To receive more information, "PREPARE MEMO" may be checked.

(C L A S S I F I C A T I O N)

EXECUTIVE SUMMARY (DATE STAMP)

(U) PREPARATION OF AN EXECUTIVE SUMMARY. (U) (Agency Office Symbol) An EXSUM is a brief summary of information either in response to a question or to provide unsolicited information. The EXSUM should not exceed 15 lines. It should be prepared in a concise but informal style, making use only of approved acronyms and abbreviations. Normally, abbreviations are spelled out before using. The EXSUM should begin with the overall classification, followed by the subject (underlined). The originator's organization will appear next, followed by the body of the summary text. Ensure that the originator is identified and the EXSUM approved as shown below. "PREPARE MEMO" should end the summary. PREPARE MEMO____.

Originator's Name/Office Symbol/Extension

APPROVED BY_____

Tasking Control # _____ (if appropriate)

(C L A S S I F I C A T I O N)

APPENDIX D

SUSPENSE DATES

1. Suspense dates are established on all action cases and are assigned using a Tasking Control Document by an appropriately delegated authority or designated representative. When several actions and suspense dates are involved, agencies and suspense dates will be shown in the text and on the signature page. Each ADECC is responsible for monitoring suspenses and for apprising the tasking authority of any potential delays or modifications.

2. Suspense dates usually are established as follows:

TYPE	SUSPENSE DATE ESTABLISHED
Cases received from OSD with a suspense date on the OSD Tasking Control Document.	For direct replies, use OSD suspense; for actions requiring OSA or OCSA approval, OSA or OCSA suspense must allow sufficient time for processing. When OSD suspense appears unrealistic, action will be taken to determine if additional time can be granted. If OSA does not grant an extension and final action cannot be completed by suspense date, an interim response will be prepared. Interim responses slip the suspense date to 30 days from the date of the interim response.
Cases for SECDEF or DEPSECDEF signature to the President or to Senior White House staff members on behalf of the President.	As directed by OSD, usually within 24 hours of receipt by OSD.

TYPE	SUSPENSE DATE ESTABLISHED
Cases for SECDEF or DEPSECDEF signature to Cabinet members, Members of Congress, State Governors, and senior White House staff members.	As directed by OSD, usually within four working days of receipt by OSD. Suspense to SA or USofA is normally one working day prior to OSD suspense.
Other cases for SECDEF and DEPSECDEF.	As directed by OSD, usually within seven working days of receipt by OSD. Suspense to SA or USofA is normally one working day prior to OSD suspense.
Cases received from OSD with no suspense date given.	Ten working days from ECC dispatch date.
White House cases.	Six working days or as prescribed in AR 1-9.
Congressional cases for signature of SA, CSA, USofA, or VCSA.	Five working days from ECC dispatch date unless otherwise directed by OSA, OCSA, or ECC.
Cases received from 4-star flag officers or from civilians equivalent in stature.	Three working days for interim or final reply.
Correspondence received from retired 4-star officers or from civilians of equivalent stature.	Five working days for interim or final reply.

TYPE	SUSPENSE DATE ESTABLISHED
Other cases for signature or review of SA, CSA, USofA, or VCSA.	Ten working days from ECC dispatch date, unless an extension is approved by tasking authority.
Messages and letters addressed to or of personal interest to the SA, CSA, USofA, VCSA, or DAS.	Three working days for messages, five working days for letters.
Freedom of Information Act (FOIA) cases.	Ten working days for final reply (see AR 25-55).
SA or CSA Trip Memo Taskers.	Fourteen working days or sooner, interim reply if necessary using EXSUM format.
Other action cases.	Determined on case-by-case basis. When action is not time sensitive, an expected date of completion will be requested in lieu of a centrally imposed suspense.

APPENDIX E

GENERAL GUIDANCE ON CORRESPONDENCE FOR SA SIGNATURE

-- Do not date correspondence.

-- When preparing the address block, avoid multiple indented lines.

-- Begin the salutation two lines below the address block.

-- Do not number paragraphs -- indent five spaces or one auto tab and begin typing at the sixth space.

-- Avoid abbreviations except for those generally accepted, such as a.m., p.m., or Inc. Acronyms should always be spelled out the first time, then placed in parentheses (e.g., Memorandum of Understanding (MOU)).

-- Do not carry abbreviations such as (Jr., Inc.) to the next line, adjust spacing to accommodate or move entire words to next line.

-- Complimentary close for SA letters is "Sincerely."

-- SA signature block: Togo D. West, Jr. Begin signature block one tab to the right of the center of page.

-- When using SA flag stationery or letterhead, do not use "Secretary of the Army" below the name.

-- Do not intermingle the words "enclosure" and "attachment." However, use of the word "attachments" is not appropriate on memorandums.

-- Do not staple if there is correspondence to be signed. Prepare and enclose an envelope on preprinted envelope stock. Staff action should contain action officer's name and telephone number. Any enclosures and all coordinations should be identified by name or position in cover memorandum.

-- Minimize the use of pronouns "I," "my," and "mine" to the extent possible without writing in passive voice.

-- Use a direct style of writing. Get to the point without a lot of unnecessary words.

-- When mentioning dates, use the civilian style (e.g., January 26, 2000). Remember to place a comma after the year when using the civilian date style. Keep month, day and year on same line of the text. If necessary, split the day and year but keep the month and day together on the same line.

-- Hyphenation: Hyphenating is acceptable on SA correspondence, but do not hyphenate first line of a paragraph nor the line next to the last line. Always ensure that words are properly hyphenated and are not hyphenated two lines in a row. Never hyphenate proper nouns.

-- Before preparing an action in final, make sure the margins are equal on both sides and the text appears balanced on page. Margins should be adjusted (within a range of one inch to 1.5 inches to balance length and width of text. Do not use full or right justified margins.

-- Whenever possible, keep correspondence to a single page.

-- Avoid using excessive modifiers in text, particularly those that reflect effusive praise.

-- Always address letters to a person, never a position title, company, etc.

-- Avoid using formal, stilted or choppy writing. Use "everyday" words; avoid wordy expressions such as "in order to" or "in accordance with."

-- Avoid using split infinitives--for example: use "...to understand fully" instead of "...to fully understand."

-- Keep sentences and paragraphs short. Omit needless words.

-- Avoid using jargon. Use positive approach. Use active voice; not passive.

-- Personalize correspondence. Do not write in the third person or the abstract--write directly to the person.

-- State ideas logically using correct grammar; easily understood words, phrases, paragraphs; and proper punctuation.

-- Ensure replies for SA signature or review, respond to each point raised in the incoming correspondence.

SA LETTERHEAD

Do Not Date

The Honorable Lawton Chiles
Governor of Florida
Tallahassee, Florida 32399

Dear Governor Chiles:

Use a direct style of writing. Get to the point without a lot of unnecessary words. Ensure replies for SA signature or review respond to each point raised in the incoming correspondence.

Adjust margins to where the letter is framed on the page. Use 12 point (pt) arial or comparable.

Do not use abbreviations in the address or signature blocks. Always address letters to a person, never a position title, company, etc.

Single-space the body of a letter with double spacing between paragraphs. Do not number or letter paragraphs. Avoid subparagraphs when possible. Effective paragraphs should not contain more than 10 lines.

Whenever possible, keep correspondence to a single page. Leave at least a 1-inch margin at the bottom of multiple-page letters. When you need more than one page, there should be a minimum of two lines of text on the second page.

The complimentary close for SA letters is "Sincerely." SA signature block: Togo D. West, Jr.

Sincerely,

Togo D. West, Jr.
Secretary of the Army

Figure E-1 Example of SA letter format

ANNEX E-1

SIGNATURE INFORMATION AND STATIONERY OF OFFICIALS IN THE OFFICE OF THE SECRETARY OF THE ARMY

1. Correspondence prepared specifically for the signature of officials in the Office of the Secretary of the Army will be prepared on the appropriate letterhead with corresponding signature block as indicated unless instructed otherwise.

2. Use "Department of the Army" stationery for those actions that meet statutory or established governmental requirements for SA signature or for USofA as Acting SA, or for those actions the SA and CSA will co-sign.

3. Use "Department of the Army" stationery when the signature is uncertain or when the reply is for the signature of the acting SA.

4. Use DoD letterhead for correspondence from Chief of Legislative Liaison, Chief of Public Affairs, and Director of Information Systems for Command, Control, Communications and Computers.

5. Department of the Army, Secretary of the Army, and Office of the Secretary of the Army stationery, can be obtained from Headquarters, Property Management Acquisition Support Division, room 1D619, telephone 695-2244. Other stationery can be obtained from the office of that activity. Requests for stationery should be limited to actual need.

a. Secretary of the Army. The SA is the only Secretariat principal who uses "Secretary of the Army" standard (8-1/2 x 11) and "Secretary of the Army "small (7 x 8-1/2) stationary.

Letterhead

Signature Block Togo D. West, Jr.

b. Secretary of the Army. Use "Department of the Army" stationery for those actions that meet statutory or established governmental requirements for SA signature, or for USofA as Acting SA, or for actions to be co-signed by the SA and CSA.

Letterhead

Signature Block Togo D. West, Jr.
Secretary of the Army

c. Secretary of the Army. Use "Department of the Army" stationery when the signature is uncertain, or when the reply is for the signature of the acting SA.

Letterhead

Signature Block Leave Blank

d. Under Secretary of the Army.

Letterhead

Signature Block Joe R. Reeder

ANNEX E-2

SIGNATURE INFORMATION AND STATIONERY FOR CORRESPONDENCE CO-SIGNED BY THE SECRETARY OF THE ARMY AND THE CHIEF OF STAFF, ARMY

Dennis J. Reimer
General, United States Army
Chief of Staff

Togo D. West, Jr.
Secretary of the Army

Note: "Department of the Army" is the appropriate stationery to use for correspondence co-signed by the SA and CSA.

APPENDIX F

GENERAL GUIDANCE ON CORRESPONDENCE FOR CSA SIGNATURE

-- Do not date stamp correspondence for the CSA.

-- Address letters to a person--never a position title, company, etc.

-- When possible, keep correspondence to one page.

-- Key sentence should appear by end of first paragraph.

-- Keep sentences and paragraphs short.

-- Avoid wordy expressions such as "in order to" and "in accordance with."

-- Write simple, clear statements using plain language that is to the point.

-- Avoid using a formal, stilted, and choppy writing style.

-- Avoid using jargon.

-- Use positive approach.

-- Write in present tense and use first person.

-- Use active voice; not passive.

-- Personalize correspondence. Do not write in the third person or the abstract--write directly to the person.

-- State ideas logically using correct grammar; easily understood words, phrases, paragraphs; and proper punctuation.

-- Avoid using split infinitives--for example: use "...to understand fully" instead of "...to fully understand."

-- On cover memorandums state the purpose as follows: "PURPOSE: To inform the Chief of Staff of..." or "To propose that the SECDEF

approve..." The purpose is not "To obtain CSA signature..."

-- Margins. The document should look neat with an inch margin on both sides.

-- Salutations. Do not use first name on responses to Army general officers and chiefs of other Services. If doubt exists, contact the ADECC or secretary to the CSA.

-- Complimentary close. Use "Sincerely," on all letters.

-- Use of "shall" or "will." Follow the rule of good writing, being attuned to the CSA's use of "I" or "we" as it expresses determination or consent.

-- Use of "Assure." Use "assure" not "ensure."

-- Use of "I" and "we." Use "I" consistent with good writing, but do not overuse. Use "we" when it makes sense.

-- Be positive. Use "I know" not "I'm sure." Likewise use "hope" or "hopefully" in situations outside the CSA's sphere of influence. Use "Your help is appreciated" instead of "I appreciate your help."

-- <u>AVOID REDUNDANCY (IN BOTH WORDS AND THOUGHTS)</u>

ANNEX F-1

SIGNATURE INFORMATION AND STATIONERY FOR OFFICIALS
IN THE OFFICE OF THE CHIEF OF STAFF, ARMY

1. SIGNATURE BLOCKS. OCSA signature information is as follows:

a. Chief of Staff. NOTE: Use flag stationery for personal correspondence. See appendix H.

Letterhead

Signature Block for letters	Dennis J. Reimer General, United States Army Chief of Staff

b. Vice Chief of Staff.

Letterhead

Signature Block for letters	Ronald H. Griffith General, United States Army Vice Chief of Staff

c. Director of the Army Staff.

Letterhead

Signature Block for letters	John A. Dubia Lieutenant General, United States Army Director of the Army Staff

2. DELEGATION OF SIGNATURE AUTHORITY.

a. Correspondence prepared for the Acting Chief of Staff, Army.

(1) When the VCSA is designated acting Chief of Staff, the following signature block will be used unless otherwise directed:

RONALD H. GRIFFITH
General, United States Army
Vice Chief of Staff

(2) When the Office of the Chief of Staff specifically directs correspondence to be prepared with an "Acting Chief of Staff" signature block, the following will be used:

(NAME OF INCUMBENT)
(Rank), United States Army
Acting Chief of Staff

b. Correspondence prepared for the Acting Vice Chief of Staff.

When the Vice Chief of Staff is designated Acting Chief of Staff or when he is absent, correspondence normally addressed to the Vice Chief of Staff will continue to be prepared for the Vice Chief of Staff's signature and not for the Acting Vice Chief of Staff. If required, OCSA will direct agencies to prepare correspondence with the following signature block:

(NAME OF INCUMBENT)
(Rank), United States Army
Acting Vice Chief of Staff

APPENDIX G

GENERAL GUIDANCE FOR CORRESPONDENCE PREPARED FOR SECDEF OR DEPSECDEF SIGNATURE

1. Coordinate action informally with OSD elements; list such coordination in the ACTION MEMORANDUM to the SA. If action is going to SECDEF or DEPSECDEF for final action, see paragraph 4, below.

2. Prepare the suggested response for SA signature (see app E for further guidance); prepare ACTION MEMORANDUM; deliver to the appropriate ADECC.

3. After SA signs, ECC will date and contact action officer for pickup and delivery to OSD.

4. On correspondence to SECDEF or DEPSECDEF, coordinate formally with OSD principals or principal deputies and other Services as appropriate. List names (with signature or initials), offices, and dates of formal coordination on separate sheet (as shown below) and attach to ACTION/INFORMATION MEMORANDUM as the last tab.

FORMAL COORDINATION

PRINCIPAL ASSISTANT SECRETARY OF DEFENSE

NAME	DATE	PHONE NO.
Assistant Secretary of Defense (P&L) (Production and Logistics)		

5. Return complete, formally coordinated package with three copies to ECC for processing.

6. The action officer or ECC will deliver action to OSD for signature.

Correspondence submitted to the SECDEF, DEPSECDEF, and Executive Secretary shall be delivered to room 3A948; deliver correspondence for other OSD officials to that individual's office.

7. After OSD signs, ECC will distribute file copies.

ANNEX G-1

SIGNATURE INFORMATION AND STATIONERY FOR THE SECRETARY OF DEFENSE AND THE DEPUTY SECRETARY OF DEFENSE

1. DO NOT use signature block on correspondence prepared for SECDEF/DEPSECDEF signature.

2. Stationery for OSD can be obtained from the Service Supply Center located in room 3C157.

(LETTERHEAD)

MEMORANDUM FOR THE SECRETARY OF DEFENSE
DEPUTY SECRETARY OF DEFENSE

FROM: (POSITION TITLE)(Signers signature or initials and date on this line)
Prepared by: (Name, Office Symbol, Extension){Do not use voice mail telephone line}

SUBJECT: (Brief subject)-ACTION MEMORANDUM

PURPOSE: Concisely state problem or issue. Urgent or immediate action should be flagged here.

DISCUSSION: Cover memorandums for ACTION MEMORANDUMS shall be short, to the point and one page. Brief recital of issues involved and important background to include a description of the action-forcing event, the Agency's position in the matter and an analysis of the impact of any decision. Attach additional staff-prepared discussions, outgoing signature item (when appropriate), incoming correspondence, taskers, and any other pertinent information which may be needed to make an intelligent, informed decision.

Make maximum use of the space available for a one-page cover memorandum within the guidelines provided regarding contents, type size and spacing. Signature(s) on cover memorandum should be reflected on the "FROM" office lines using either full signature or initials(as long as identification or the signer is clear).

COORDINATION: Coordinations (office symbols) and initials, or indicate Tab location.

RECOMMENDATION: Carefully framed recommendation consistent with information provided above.

APPROVED:_____
DISAPPROVED:_____
OTHER:_____

Figure G-1. Format of Action Memorandum for SECDEF and DEPSECDEF

(LETTERHEAD)

MEMORANDUM FOR THE SECRETARY OF DEFENSE
DEPUTY SECRETARY OF DEFENSE

FROM: (POSITION TITLE)(Signer's signature or initials and date on this line)
Prepared by: (Name, Office Symbol, Extension){Do NOT use voice mail telephone line}

SUBJECT: (Brief subject)-INFORMATION MEMORANDUM

PURPOSE: Concisely stated need for the memorandum: i.e., respond to specific request; update on a particular issue; status reports on current issues; summarize a report; etc.

DISCUSSION: Statements of situation or subject; new developments; interpretative comments; probably future development(s); summary of attached reports, etc. Information memorandums should be one page. If longer or additional, detailed information needs to be provided, the material should be provided as attachments and referenced in the body of a short cover memorandum. Any taskers should be attachments.

Margins for the cover memorandum are flexible; i.e., need not be indented block style. Format elements may vary depending on the subject involved; i.e., background or options versus discussion. All memorandums should be addressed to both the SECDEF and DEPSECDEF, unless specifically for the DEPSECDEF. Ensure all levels have signed/initialed and dated the cover memorandum.

Figure G-2. Format of Information Memorandum for SECDEF and DEPSECDEF

(LETTERHEAD)

(BLANK)

MEMORANDUM FOR THE PRESIDENT

SUBJECT: Correspondence to the President

The purpose of this memorandum is to provide a sample of a memorandum for the President. Basic memorandum preparation guidance found in Administrative Instruction No. 7 is reflected in this sample.

The following special guidance applies:

a. Memorandums to the President should normally be on one page. They will be signed by the SECDEF; therefore use Secretary of Defense letterhead.

b. Do NOT indicate "ACTION" or "INFORMATION" memorandum after the subject line. When providing information to the President, the elements found in Chapter 2, Paragraph 2-12.c., should be covered as applicable. Should a second page be required, follow normal memorandum preparation guidance.

Memorandums for the President should be addressed under cover of an ACTION MEMORANDUM for the Secretary. Remember that these memorandums should reflect the best the Department has to offer in appearance, clarity and conciseness.

(BLANK)

Figure G-3. Format of Memorandum for President

APPENDIX H

LETTER FORMAT

1. Letters prepared for the signature of OSA and OCSA officials will follow AR 25-50 and supplemental guidance below.

a. Figure H-1 is an example of a letter for SA signature.

b. Figure H-2 is an example of a letter for CSA signature.

2. Supplemental guidance.

a. Letters used to respond to personal letters from chairpersons of the National Security or Appropriations Committees of either the House or Senate and the chairpersons of the Defense subcommittees or the Appropriations subcommittees.

(1) Such letters will use the greeting "Dear Mr. Chairman," or "Dear Madam Chairman." All full committee chairpersons will be addressed as "Dear Mr. Chairman," or "Dear Madam Chairman." Other "titled" senior congressional members will be addressed by their title, such as "Dear Mr. Speaker" or "Dear Madam Speaker." Use "Dear Senator_____" when addressing Senators and "Dear Congressman or Congresswoman_____" when addressing U.S. Representatives.

(2) Letters addressed to persons whose title includes the Honorable should begin with The Honorable (Full Name).

(3) Letters addressed to persons whose title is Secretary should begin with Dear Mr. Secretary or Dear Madam Secretary.

(4) When referring to Congress, use U.S. House of Representatives and U.S. Senate instead of just House of Representatives or Senate.

b. Stationery. Stationery should be the most appropriate size for the job; that is, short letters typed on smaller stationery. Succeeding pages should be the same size and weight as the first page. Standard size stationery may be obtained from the Acquisition Support Division, OSA, room 1D619 . Letters of a personal nature for signature of the SA, CSA, USofA, or VCSA will be typed on appropriate flag stationery. Obtain clarification from ECCO on questionable cases.

3. Letters prepared for signature of officials in OSD:

a. Figure H-3 is an example of a letter for SECDEF or DEPSECDEF signature. Also, follow the specific guidelines below.

b. Use civilian format (month, day, year) when date is mentioned in text of letter. Letters should be in the first person and active voice.

c. Appropriate letterhead stationery and signature blocks are listed at appendix G.

d. Xeroxed file copies are preferred.

e. Length. Generally limited to one page. Consider using attachments if one page will not adequately address the issue.

f. Salutations on letters signed by the SECDEF or DEPSECDEF to members of Congress will be addressed as specified in the OSD Military Assistants' Handbook (available for reference in the ECCO).

g. DO NOT use signature block on correspondence prepared for SECDEF or DEPSECDEF signature.

(SA LETTERHEAD)

(Leave date blank)

Lieutenant Colonel John Smith
Commander
U.S. Army Support Element
Multinational Force and Observers
North Camp, AE 09677

Dear Colonel Smith:

Thank you for your letter of June 18, 1995, concerning the correspondence style used by the Secretary of the Army.

Some of the rules we employ include using civilian date (i.e., month, day, year) and stationery best suited for the length of the memorandum or letter.

Use margins appropriate for the length of the letter and balance the text on the page. Arial 12 point (pt) or comparable is the preferred print. Avoid proportional space fonts and do not use full or right justified margins.

Begin salutation on second line below address. Begin text on second line following salutation. Do not number or letter paragraphs. Indent five spaces and begin typing on the sixth. Avoid subparagraphs when possible.

Start the complimentary close "Sincerely," on the second line below the last line of the letter. Begin signature block one tab to the right of the center of the page.

Type the signature block "Togo D. West, Jr." on the fifth line below the closing, beginning one tab to the right of the center of the page.

Sincerely,

Togo D. West, Jr.

Figure H-1. Letter for SA signature

Leave date blank

Brigadier General Robert A. Jones
Commander
15th Support Command
Fort Longworth, Oregon 97111

Dear General Jones:

This is an example of a letter properly formatted for the CSA's signature. Some rules to follow--omit needless words; write in the "active voice," using a "positive" form; avoid split infinitives; use "assure" instead of "ensure."

Begin salutation on the second line following the address. Begin text on the second line following the salutation. Indent four spaces and begin typing on the fifth.

The document should appear neat on the page with at least a 1-inch margin on both sides. Adjust margins as needed so that the letter is framed on the page.

Start the complimentary close "Sincerely," on the second line below the last line of the letter. Begin at the center of the page.

Type the signature block on the fifth line below the closing, beginning at the center of the page.

Sincerely,

Dennis J. Reimer
General, United States Army
Chief of Staff

Figure H-2. Letter for CSA signature

Leave date blank

Mr. Robert Roundhouse
1977 Pennsylvania Avenue
Washington, D.C. 20500

Dear Mr. Roundhouse:

Thank you for your recent letter regarding preparation of correspondence for SECDEF and DEPSECDEF signature. Some of the rules we follow are provided in the following paragraphs.

Use the correct letterhead, inside address and salutation. Always use a colon after the salutation.

A preferred opening sentence is "Thank you for your recent letter regarding ..." or "Thank you for your letter of October 20 regarding ...(The year can be omitted if it is a recent letter).

Avoid telling the reader what he or she already knows, such as a detailed description of a letter being answered.

Never use a split infinitive (e.g., "to continually work" should properly be "to work continually.") Often the word splitting the infinitive is unnecessary or contradicting and can be omitted; e.g., to clearly understand.

Use an Information or Action Memorandum to transmit correspondence for signature or information to SECDEF or DEPSECDEF.

In the closing paragraph of a letter, don't invite the person to write again. Thank him or her for their interest in national defense.

Start the complimentary close "Sincerely," on the second line below the last line of the letter. Personal correspondence for SECDEF signature addressed by first name in the salutation should close with "Best regards".

Sincerely,

Figure H-3 Letter for SECDEF or DEPSECDEF signature

APPENDIX I

MEMORANDUM FORMAT

1. General:

a. The memorandum is the primary internal correspondence medium used by Headquarters, Department of the Army.

b. Memorandums for the SA or USofA. Memorandums from ARSTAF agencies need not be addressed through the Assistant Secretaries, but will be coordinated formally with the Assistant Secretaries or their Principal Deputies .

c. Style:

(1) Keep length to one page, but no more than two pages.

(2) Use enclosures only if essential--tabular form or telegraphic style when possible.

d. Action Memorandum:

(1) An Action Memorandum is used to submit recommendations and staff actions that require a decision by an OSA or OCSA official.

(2) An Action Memorandum will be to the point and contain only essential facts necessary to understand the case. Issues will be summarized so that when read, the memorandum represents the complete situation without reference to enclosures. Enclosures are reserved to furnish detailed analysis or explanation of the summary presented.

(3) All major implications that have become apparent (e.g., public relations, budget, environment, manpower, security, morale, legal, congressional) should be included.

(4) Cite results of coordination in the discussion paragraph or list results at the bottom of the last page. On correspondence addressed to the SA, show the name or position of all persons with whom the action was coordinated.

(5) The term "ACTION MEMORANDUM" will follow the subject.

e. Information Memorandum:

(1) An Information Memorandum will be used to furnish information not requiring action by the DAS, VCSA, USofA, CSA, or SA.

(2) Results from coordination will be shown in the same manner as in an Action Memorandum.

(3) The term "INFORMATION MEMORANDUM" will follow the subject.

2. Action and Information Memorandums addressed to or prepared for the signature of officials in the Office of the Chief of Staff. (See pages I-5 thru I-7) These formats will be used for correspondence forwarded within the ARSTAF:

a. Show the date the memorandum was signed in the upper right corner. Enclosures needed to document the case or provide detailed explanation should be dated on the day prepared.

b. Show action officer's name and telephone extension in the lower-right corner of the last page.

c. Coordinate memorandums directly with those agencies concerned with the subject matter. Coordination will be effected with authorized individuals and results stated in the memorandum.

d. The text should have ample margins on both sides.

e. Information Memorandum. See figure I-3 (page I-7). Use same format as for an Action Memorandum, except for the following:

(1) Subject. Type the words "--INFORMATION MEMORANDUM" after title of the subject.

(2) Text of the Memorandum. Begin on third line below the subject. No specific paragraph headings are prescribed as required for action memorandums.

f. Correspondence prepared for SECDEF or DEPSECDEF must be accompanied by an information or action memorandum as required by the OSD Executive Secretary. (See pages G-3 and G-4)

3. Other memorandums prepared for the signature of officials in OCSA. Use format in Figure I-3(page I-7), but without the words "INFORMATION MEMORANDUM" after the subject. Appropriate letterhead will be used omitting name and extension of action officer. This format is used primarily when the DAS, VCSA, or CSA sign a memorandum to an addressee on the ARSTAF. Do not include office symbols on memorandums for signature of the CSA or VCSA; however, internal or file copies should show office symbol or action officer's name to identify office responsible for action.

4. Memorandums addressed thru the CSA for the SA. Use format in Figure I-4. As a rule, correspondence addressed through the Chief of Staff is addressed to the Secretary of the Army, not an Assistant Secretary.

5. Memorandums addressed to or prepared for the signature of officials in OSA. (See Figures I-5, I-6, and I-7.)

6. Memorandums addressed to HQDA principals. The format (figure I-7) is the same format used by OSA. These memorandums may be signed by appropriate HQDA officials in the Secretariat and the ARSTAF. Taskings by ARSTAF agencies to Secretariat officials will be handled through DECC.

7. Memorandums addressed to or prepared for the signature of officials in OSD. The following applies:

a. Use formats at Figures I-8 and I-9, respectively, to prepare an information or action memorandum for SECDEF or DEPSECDEF. Indicate coordination and include a decision block on action packages.

b. On correspondence to other OSD officials, use same format OSA uses.

c. Margins will be 1 inch on correspondence signed by the SECDEF or DEPSECDEF.

d. Do not use signature block on correspondence prepared for SECDEF or DEPSECDEF signature.

e. Type all subsequent page numbers on eighth line from top of page, flush with right margin.

f. The originating office is responsible for obtaining necessary coordination of other DoD components.

g. When no staff interests external to the originating office are involved and coordination is not required, include a statement to that effect at end of memorandum.

h. Formal coordination required from other DOD components will be with the head or principal deputy of the component concerned.

i. When a DoD component nonconcurs in a memorandum prepared for the SECDEF or DEPSECDEF, the originating office will include a full explanation of the differences either in the memorandum or in a supplement (enclosed). The originator will include reasons why the nonconcurrence should be overruled.

j. When an OSD tasker requests coordination, include in the package the OSD tasker and information showing office and signature or initials of principal or principal deputy who coordinated on action. (Enclose as last tab to action.)

DAPE-XXX 9 January 19XX

MEMORANDUM FOR CHIEF OF STAFF, ARMY

SUBJECT: Preparation of Correspondence--ACTION MEMORANDUM

1. Purpose. To describe the format of an Action Memorandum.

2. Discussion:

a. An action memorandum is used to submit recommendations and staff actions that require a decision by an OSA or OCSA official.

b. Office symbol. Do not use office symbols on memorandums signed by the SA, CSA, USofA, or VCSA. When used, type office symbol at the left margin on second line below the seal.

c. Date. Memorandums are normally forwarded for signature without a date. When necessary, place date in the upper right corner on the same line as the office symbol.

d. Address. Type on third line below the office symbol. If no office symbol is used, begin typing on fifth line below the seal.

e. Subject. Type the subject on the second line below the last line of the address. Type the words "--ACTION MEMORANDUM" after the title of the subject.

f. Text of the memorandum. Begin text on third line below the subject. On correspondence addressed to OCSA officials, the first paragraph should be titled "Purpose," second "Discussion," and third "Recommendation."

g. Paragraphs. Number, letter, and indent paragraphs on OCSA as prescribed in AR 25-50. See appendix F for guidance on paragraphing correspondence for SA.

Figure I-1. ACTION MEMORANDUM for CSA

DAPE-XXX
SUBJECT: Preparation of Correspondence-- ACTION MEMORANDUM

h. Second page. On OCSA correspondence type subject heading on eighth line from top of page. Begin the continuation of the text at the left margin on the third line below the subject line.

i. Signature block. Begin on fifth line below last line of text (or authority line) beginning in the center of the page. Appropriate letterhead and signature blocks for OSA officials are specified in appendix E and for OCSA officials in appendix F.

j. Enclosures. Identify enclosures flush with the left margin beginning on the same line as the signature block. Type as prescribed in AR 25-50. Identify enclosures in the text rather than list them.

k. Page numbers. Center the page number one inch from the bottom of the page.

l. Authority line. If used, type on second line below last line of text.

3. Recommendation: That the "ACTION MEMORANDUM" format be approved for use in HQDA.

Encl (Signature block)

2

Figure I-2. Preparation of Correspondence-- ACTION MEMORANDUM

DAPE-XXX 9 January 19XX

MEMORANDUM FOR CHIEF OF STAFF, ARMY

SUBJECT: Preparation of Correspondence--INFORMATION MEMORANDUM

1. An Information Memorandum will be used to furnish information not requiring action by the DAS, VCSA, USofA, CSA, or SA.

2. This format also is used for memorandums signed by CSA, VCSA, and DAS. Do not use office symbols on memorandums for CSA or VCSA signature.

3. Subject. The term "INFORMATION MEMORANDUM" will follow the subject.

4. Text of the memorandum. Begin on the third line below the subject. No specific paragraph headings are prescribed as required for action memorandums.

5. Results from coordination will be shown in the same manner as in an action memorandum.

Encl Signature Block

Figure I-3. Information Memorandum for CSA

DA Memo 25-52

MEMORANDUM THRU CHIEF OF STAFF, ARMY

FOR THE SECRETARY OF THE ARMY

SUBJECT: Example of a Memorandum through the Chief of Staff to the Secretary of the Army--(ACTION OR INFORMATION)

This is an example of a properly prepared memorandum routed through the Chief of Staff, Army, for the Secretary of the Army.

Prepare memorandum in **12 point (pt) Arial or comparable type** using the same basic rules for preparing correspondence for the CSA signature. Do not number paragraphs.

As a rule, correspondence addressed through the Chief of Staff is addressed to the Secretary of the Army, not an Assistant Secretary. However, this format can be used to address an Assistant Secretary lined-thru for the Chief of Staff by the Director of the Army Staff (DAS) or an Assistant to the Director, ECC.

Encl

JOHN A. DUBIA
Lieutenant General, GS
Director of the Army Staff

Figure I-4. Memorandum thru CSA for SA

MEMORANDUM FOR ASSISTANT SECRETARY OF THE ARMY (CIVIL WORKS)

SUBJECT: Preparation of Secretariat Memorandums

This is an example of a memorandum prepared for the signature of officials in OSA.

Date. Memorandums are normally forwarded for signature without a date. When necessary, center date on the second line below the printed letterhead.

Office symbol. Do not type office symbol on original memorandums; however, office symbols may be used on copies.

Address. Do not use abbreviations. Exceptions are "U.S." "D.C."

Subject. Type on second line below address line. If the memorandum is addressed to an official in OSD, the words "ACTION MEMORANDUM" or "INFORMATION MEMORANDUM" will follow the subject. If an action or information memorandum is required (see OSD Military Assistants' Handbook), use formats at figures I-8 or I-9.

Text of the memorandum. Begin on third line below the subject line. Do not number paragraphs. Indent five spaces and begin typing on sixth. See guidance for SA correspondence at appendix F, and always single space the text.

Signature block. Begin signature block on fifth line below the last line of text, beginning just right of center of page.

Enclosures. The word "enclosure" is the appropriate terminology to use in memorandums. Type at left margin on second line below signature block. Do not show the number of enclosures nor list them. If there is more than one enclosure, show the plural form. The term "attached" or "attachments" is no longer appropriate to use in memorandums.

Figure I-5. Memorandum addressed to or prepared for signature of OSA officials

Second page. Type page number "-2-" in the center on fifth line from top of page. Start text on fifth line under page number. The margins should be the same as first page.

Appendix E-1 provides examples of appropriate letterhead.

Encl

Samuel T. Schwartz
Chief, Management Branch

Figure I-6. Memorandum addressed to or prepared for signature OSA officials
--Continued

MEMORANDUM FOR PRINCIPAL OFFICIALS OF HEADQUARTERS,
DEPARTMENT OF THE ARMY

SUBJECT: Preparation of Correspondence for HQDA Officials

This is an example of a memorandum addressed to principal officials of HQDA. The term principal officials of HQDA include those officials listed on page I-12.

Appendix E provides an example of appropriate letterhead.

(Signature block)

Enclosure

Figure I-7. Memorandum addressed to HQDA principals for signature of HQDA officials

PRINCIPAL OFFICIALS OF HEADQUARTERS, DEPARTMENT OF THE ARMY

Secretary of the Army
Chief of Staff, Army
Under Secretary of the Army
Vice Chief of Staff, Army
Assistant Secretary of the Army (Civil Works)
Assistant Secretary of the Army (Financial Management and Comptroller)
Assistant Secretary of the Army (Installations, Logistics and Environment)
Assistant Secretary of the Army (Manpower and Reserve Affairs)
Assistant Secretary of the Army (Research, Development and Acquisition)
General Counsel
Administrative Assistant to the Secretary of the Army
Director of the Army Staff
Director of Information Systems for Command, Control, Communications, and Computers
The Inspector General
The Auditor General
The Deputy Under Secretary of the Army (International Affairs)
The Deputy Under Secretary of the Army (Operations Research)
Chief of Legislative Liaison
Chief of Public Affairs
Director, Small and Disadvantaged Business Utilization
Chairman, Army Reserve Forces Policy Committee
Deputy Chief of Staff for Intelligence
Deputy Chief of Staff for Logistics
Deputy Chief of Staff for Operations and Plans
Deputy Chief of Staff for Personnel
Assistant Chief of Staff for Installation Management
Chief of Engineers
The Surgeon General
Chief, National Guard Bureau
Chief, Army Reserve
The Judge Advocate General
Chief of Chaplains

APPENDIX J

ASSEMBLING AND TABBING CORRESPONDENCE

1. General.

a. Do not staple original correspondence forwarded for signature.

b. Assemble final action paper in the following sequence:

(1) Transmittal "Action Memorandum" or "Information Memorandum".

(2) Proposed reply requiring signature with any enclosure (use executive correspondence acetate cover for protection).

(3) Reply envelope, if any.

(4) Original incoming correspondence.

(5) Other supporting documents.

(6) Copies.

c. Correspondence for signature or papers that are to be forwarded to higher authority for approval will not be marked in any way. If sidelining is necessary, use a separate strip of paper attached to the underside of the page and folded over. This will be removed before the document is dispatched from OCSA.

d. When headings and data run lengthwise of tabbed pages, these pages will be placed so that headings are to the left margin of the transmittal document.

e. Charts and graphs will be reduced to the smallest legible size in order to conserve paper. Avoid using enclosures that exceed 81/2 X 11 inches.

2. Tabbing--keep tabs to a minimum:

a. Tabs may be any letter or number as long as tabs are displayed consecutively and, if more than one tab is required, each tab should be identified in the text.

b. Preprinted tabs may be used. When using transparent celluloid index tabs, follow paragraphs 2c and d below and affix to right side on separate sheet of bond paper, spaced from top to bottom 1/2 inch apart. As a general rule, tabs will be arranged top to bottom so that they do not block the reader's view of other tabs or markers.

c. Primary attachments or enclosures should be letter tabs (1/2").

d. Secondary enclosures should be enclosure tabs (3/4") and marked "Encl," "Encl 1," "Encl 2," etc.

e. Do not use enclosures to enclosures unless it benefits the addressee.

f. On the first page of each enclosure write in the lower right corner in pencil, the identification of each enclosure (except on letters for signature).

g. Secure each acetate tab with tape or staple to prevent the tab from falling out.

h. For ease of reference, enclosures and attachments will be cited in the text using letter tabs to identify them.

i. Whenever appropriate, celluloid markers, other than green, may be used to point out specific lines or paragraphs at tabs.

j. All OCSA elements will use color tabs to distinguish between ARSTAF and other agency actions and material or attachments added.

k. Correspondence for signature should always be placed behind the first tab and marked with signature marker.

ANNEX J-1
COPY REQUIREMENTS

1. Do NOT tab copies unless so indicated below.

2. For actions approved by officials authorized to act for the CSA, forward one copy to OCSA. Attach a summary of the action in EXSUM format (see app C).

3. On actions for SA, USofA, CSA, VCSA, or DAS forward--

   a. One original memo (tabbed).

   b. Two copies.

4. On actions for SECDEF or DEPSECDEF forward--

   a. One original memo (tabbed).

   b. Four copies of the original memo. Three of the four copies must be tabbed.

APPENDIX K
INFORMATION PAPER

DACS-DMS
4 June 19XX

SUBJECT: Information Paper Format

1. Purpose. To provide guidance on the preparation and use of an Information Paper.

2. Facts.

a. An Information Paper provides facts in a clear and concise format (e.g., for use in a discussion or trip book). The format may be altered to meet a specific need. (See appendix C, Executive Summary, before deciding if the Information Paper is the proper format.)

b. Include the subject and the purpose. Paragraphs will contain only essential facts concerning the subject.

c. Papers will be self-explanatory and will not refer to enclosures except for tabular data, charts, or photographs.

d. Papers should not exceed one page in length and need not be signed, but must include the action officer's name and telephone number in the lower right corner. Include an approval line below AO name and number to indicate agency approval by principal, deputy, or director.

e. Avoid using acronyms and abbreviations, except for those that are familiar outside the Army (e.g., DoD, OMB, etc.).

f. Avoid using classified information when it does not contribute to understanding the issue.

g. The preparing agency will furnish the requesting official an original and one copy. Furnish an information copy to OCSA when providing Information Papers to OSA officials.

h. The Information Paper is also the medium used to provide data for trip books for OCSA and OSA officials.

i. Information Papers for Members of Congress are monitored by the Congressional Activities Division, Management Directorate. Refer to the Congressional Actions Responsibilities SOP for preparing Information Papers for Congressional actions.

Ms. Doe/58428
Approved by:_____

APPENDIX L
DISCUSSION PAPER

DISCUSSION PAPER

DAXX-ABC
1 December 19XX

SUBJECT: Format for a CSA or VCSA Discussion Paper

1. *ISSUE. How to prepare Information Papers for CSA and VCSA use in discussions.

2. *FACTS.

a. A Discussion Paper will be prepared for the CSA or VCSA. This paper is a specialized information paper and can be used whenever it best serves the recipient's purpose.

b. Use telegraphic writing style; points should "jump off the paper;" avoid unduly complex paragraphs.

c. Ensure smooth, logical flow of facts; tailor paper for the user.

(1) Determine background that user needs.

(2) Avoid technical language and unexplained acronyms.

(3) Analyze target audience. Cite previous knowledge or discussions. Show how subject affects audience. If foreign national, state what sensitive material cannot be discussed.

d. Preferred length is one page; no more than two; avoid enclosures.

e. Paper should be approved at directorate level.

3. *KEY POINTS TO BE STRESSED.

a. Present key points drawn from paragraph 2.

b. Your opportunity to influence action.

LTC BOB NORRIS/73219
Approved by_____

*Indicate defense classification of paragraphs and subparagraphs.

APPENDIX M

WHITE HOUSE CORRESPONDENCE

1. White House Correspondence and Communications. The White House Military Office (WHMO) sends DoD related correspondence and communications addressed to the President, the Vice President, their family members and staffs to the Office of the Secretary of Defense (OSD), White House Liaison Office (WHLO) for response. The OSD WHLO will subsequently task correspondence and communications to the appropriate Service. There are two types of White House actions--

a. Routine Action, Direct Reply -- agency tasked will respond directly and furnish two copies to the Army WHLO for filing (Room 3D656).

b. Special Actions.

(1) Direct Reply -- reply directly to the originator after coordinating with Army WHLO. Provide three copies of response to the Army WHLO upon completion.

(2) Fact Sheet -- provide a fact sheet for use in responding by the White House.

(3) Draft Reply -- Prepare a draft reply for use as the final letter by the White House.

2. Responsibilities.

a. The Army White House Liaison Office, Executive Communications and Control Office, OSA, will task action to the appropriate HQDA staff agency. A "Tasking Control Document" will be attached and will show the actions required with appropriate instructions in the remarks section. Tasking will be done based upon the primary question or issue addressed. For actions with multiple questions or issues, one agency will be assigned the 'lead' with other agencies, as appropriate, tasked to 'assist'. The agency assigned the lead is responsible for preparing and submitting the required response to include comments from all assisting agencies.

b. The OSD assigns a six workday suspense on White House Special Actions and a 10 workday suspense for Routine Actions.

3. Procedures and Format.

a. Routine, Direct Reply. When tasked to respond directly, the staff agency will prepare the correspondence according to Army and agency procedures and mail original response to the originator. Responses to White House correspondence must be signed by a Colonel, GS-15, GM-15 or above. Two copies of the reply will be submitted to the WHLO, accompanied by the original correspondence and Tasking Control Document.

b. Special, Direct Reply.

(1) Example of a Special Direct Reply is at Figure M-1.

(2) When tasked to respond directly, the staff agency will prepare the correspondence according to Army and agency procedures and coordinate response with the Army WHLO. Upon approval the agency will mail the response to the originator. Responses for White House correspondence must be signed by a Colonel, GS-15, GM-15 or above. Three copies of the reply will be submitted to the WHLO accompanied by the original correspondence and the Tasking Control Document.

c. Special, Fact Sheet. Example of a "Fact Sheet" is at page M-4.

d. Special, Draft Reply. Example of a "Draft Reply" is at page M-5.

Mr. John H. Doe
(Address - Street number and name)
(City, State and Zip Code)

Dear Mr. Doe:

Thank you for your letter of (month, date, and year) to President Clinton concerning ....

As much as he would like to, the President cannot reply personally to every communication he receives. Therefore, he has asked the departments and agencies of the Federal Government to reply on his behalf in those instances where they have special knowledge or special authority under the law. For this reason, your communication has been forwarded to officials of the Department of the Army.

(Begin text ....) All replies to White House communications will include an appropriate opening statement and the paragraph immediately following.

Paragraph two may be revised in cases that are particularly sensitive in nature.

Sincerely,

Must be signed by a Colonel,
GM-15, GS-15 or above

Figure M-1 Example of a Special Direct Reply

FACT SHEET

SUBJECT: Preparation of a Fact Sheet for a White House Case

1. Purpose. To demonstrate the format for a fact sheet.

2. Facts.

a. The words "FACT SHEET" will be centered on the fourth line from the top of the page.

b. Begin subject on second line following the heading "FACT SHEET." (The subject line will consist of the word "SUBJECT:" beginning at the left margin followed by a short, descriptive subject in upper and lower case. If the title of subject is more than one line, continue title on next line flush with left margin.)

c. The first paragraph will be titled "Purpose." The written purpose will follow.

d. The second paragraph will be titled "Facts." Use subparagraphs to organize the facts being presented. Develop facts in an orderly and logical sequence.

e. Enclosures, when necessary, will be referenced in the text as appropriate and identified.

f. Fact Sheets do not require an office symbol, an action officer name, or signature.

Figure M-2 Example of a Special Fact Sheet

2. Administrative Instructions. Fact Sheets will be prepared on 8-1/2x11 inch bond paper, single spaced with double spacing between paragraphs and subparagraphs, and submitted in three copies. Avoid including classified information in Fact Sheets. If classified information is required to respond to an inquiry adequately, contact the Army WHLO for instructions and guidance.

3. Transmittal. The action agency will transmit fact sheets to the Army WHLO as shown in the Tasking Control Document.

Figure M-3 Example of a Special Fact Sheet--Continued

Mr. John H. Doe
(Address - Street number and name)
(City, State and Zip Code)

Dear Mr. Doe:

Thank you for your letter of (month, date, and year) to President Clinton concerning .....

(Begin text .....) Do not type date or office symbol on draft replies. Begin inside address 10 lines from top of page flush at left margin.

Type salutation on second line below the last line of the inside address.

The White House will use draft response active voice to prepare the final response for signature. Word the text of the draft reply so that it reflects the designated individual that will sign the correspondence (e.g., the Military Assistant to the President or the President's Chief of Staff). Respond to the issue or question raised as clearly and precisely as possible, without excessive detail.

Administrative Instructions. Type draft response on 8-1/2 x 11 inch bond paper in DOUBLE SPACE and submit an original and three copies. Center the word "DRAFT" at the bottom of each page. Do not include classified information.

Transmittal. The action agency will transmit draft responses to the Army WHLO as reflected in the Tasking Control Document.

Sincerely,

D_R_A_F_T

Figure M-4 Instructions on preparing a Special Draft Reply

(DACS-DMS)

By Order of the Secretary of the Army:

DENNIS J. REIMER
General, United States Army
Chief of Staff

Official:

JOEL B. HUDSON
Administrative Assistant to the
Secretary of the Army

Distribution:

Headquarters, Department of the Army and its field operating agencies.