Priority: Normal
    Topic: Workshop Report Guidance
    Sent: 6/30/99
    From: Hoffman, Jennifer
    To: rdcr
    CC: bill.douglas; Hansen, Gary; Meehan, Michaela

Workshop Report Guidance
Richard,

Attached you will find guidelines for the Costa Rica report. As you will notice, there are several documents that will be delivered to you at tomorrow's meeting. I look forward to seeing you then.

Regards,
Jennifer

RFC822 header
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Return-Path: <jhoffman@usaid.gov>
Received: from BARRB0204.usaid.gov ([165.13.93.4])
    by brattleboro.worldlearning.org (Post.Office MTA v3.5.2
    release 221 ID# 0-54498U500L100S0V35) with SMTP id org
    for <bill.douglas@worldlearning.org>;
    Wed, 30 Jun 1999 17:54:07 -0400
Received: by BARRB0204.usaid.gov with VINES-ISMTP; Wed, 30 Jun 1999 17:56:52
    -0400
Date: Wed, 30 Jun 1999 17:52:37 -0400
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X-Priority: 3 (Normal)
To: <rdcr@erols.com>
Cc: <bill.douglas@worldlearning.org> ,
    "Gary Hansen" <ghansen@usaid.gov> ,
    "Michaela Meehan" <mmeehan@usaid.gov>
From: "Jennifer Hoffman" <jhoffman@usaid.gov>
Reply-To: <jhoffman@usaid.gov>
Errors-to: <jhoffman@usaid.gov>
Subject: Workshop Report Guidance
X-Incognito-SN: 1125
X-Incognito-Version: 4.25.339
MIME-Version: 1.0
Content-type: multipart/mixed; boundary="930779812-MIME-Part-Dividor"
June 30, 1999

TO: Richard Ouhlahan, World Learning
FROM: Jennifer Hoffman, USAID
RE: Costa Rica Workshop Report Guidance

Below you will find the guidelines that USAID wishes you to follow in the production of the Costa Rica workshop report. Please, at any time during the process, do not hesitate to contact me with questions you may have regarding substance, formatting, etc. USAID anticipates that open lines of communication will facilitate the completion of the report via just one preliminary draft followed by the final product. I can be reached by phone on (202) 712-0085 or by email on jhoffman@usaid.gov.

The various tasks associated with this are listed on the attached timeline (attachment 1). You will note that the timeline does not yet include dates. Please review the guidelines with timing in mind and bring your suggestions to Thursday’s meeting. We will establish the actual deadlines at that time.

Report Content

USAID asks that World Learning integrate the revised Washington, DC report content (to be provided on July 1, 1999) with the findings from the Costa Rica workshop, adding issue areas as appropriate. The integrated report should include an annex that delineates the primary areas of convergence and divergence between the substantive proceedings of the two workshops.

Format Guidelines

Please respect the attached DG Center technical publication guidelines (attachment 2), since the final product will be disseminated by the Center to all participants of the Washington and San Jose workshops. For further precision, also to be included with this guidance will be a copy of the second draft of the Washington report along with the memo outlining USAID’s comments on that draft. These, along with a copy of a recent DG Center publication (for formatting reference) will be delivered to you at the July 1, 1999, meeting. USAID requests that the first and final drafts of your report be submitted both electronically and in hard copy.

Review Process

The first draft of the report will be reviewed by relevant USAID staff in Washington and the field, as well as by the attending representatives from the Solidarity Center, the Department of Labor, and the Department of State. Please distribute the first draft electronically to all reviewers on the date agreed to on the attached timeline (email list of reviewers to be provided). A hard copy should also be submitted to Jennifer Hoffman. The reviewers’ resulting comments will be synthesized into one memo, to be provided to you by USAID as specified on the timeline.

Final Draft

The final draft of this report should reflect the comments provided to you by the reviewers. Please submit the final draft, electronically and in hard copy, to Jennifer Hoffman, by the date to be agreed upon at the July 1, 1999, meeting.

Cc: Michaela Meehan, USAID
    Gary Hansen, USAID
    William Douglas, World Learning

SECOND WORKSHOP REPORT TIMELINE

<table>
<thead>
<tr>
<th>TASK</th>
<th>POINT PERSON</th>
<th>DEADLINE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract extension</td>
<td>Michaela Meehan</td>
<td></td>
</tr>
<tr>
<td>Notes and flipcharts to WL</td>
<td>Jennifer Hoffman</td>
<td>July 1, 1999</td>
</tr>
<tr>
<td>First draft to all reviewers</td>
<td>Richard Ouhlahan</td>
<td></td>
</tr>
<tr>
<td>Reviewers comments to USAID</td>
<td>Jennifer Hoffman</td>
<td></td>
</tr>
<tr>
<td>Comments memo to WL</td>
<td>Jennifer Hoffman</td>
<td></td>
</tr>
<tr>
<td>Final draft to USAID</td>
<td>Richard Ouhlahan</td>
<td></td>
</tr>
</tbody>
</table>
These guidelines apply to all publications produced by contractors of the Center for Democracy and Governance, Global Bureau (G/DG), U.S. Agency for International Development. They also apply to publications produced by the G/DG itself, and to publications originally published by contractors but republished by G/DG. The guidelines are intended to ensure that G/DG publications communicate effectively and consistently, and include the following sections:

I. WRITING, EDITING, AND PRODUCTION
II. PRINTING AND DISSEMINATION
III. DOCUMENT ORGANIZATION
IV. GRAMMAR, STYLE, AND FORMAT

I. WRITING, EDITING, AND PRODUCTION

• Contractors will deliver three copies of the final, proofread publication in hard copy (single-sided and camera ready) and electronic format (Word Perfect 5.2 or 6.1, or as otherwise agreed upon with G/DG). Graphics and photos accompanying the paper should be provided in appropriate electronic formats, such as .tif, .eps, .bmp, or .jpeg. A product will be considered final after it has undergone both substantive and editorial reviews.

NOTE TO WORLD LEARNING – This schedule will be adjusted to meet needs agreed upon at the July 1, 1999, meeting.

Substantive Review: The appropriate G/DG technical team will review a final draft (in addition to drafts reviewed at various stages of a publication’s development) for substantive technical content. The contractor is responsible for incorporating changes based on G/DG’s feedback. [Note: COTRs will communicate to contractors and to the Information Unit when they have signed off on substantive technical content.]

Editorial Review (to follow Substantive Review): The contractor’s work plan will include a second review period (four weeks minimum, or until an acceptable publication has been approved by G/DG) for final editorial review and formatting. During this time G/DG contractors will copy-edit and proofread all publications produced under contract to G/DG. The contractor will employ the services of a professional editor charged with the final phase of document production. This editor will be identified to the G/DG Information Unit prior to this final phase. During the editorial review period, the G/DG Information Unit will review the publication and work directly with the contractor’s designated editor to ensure the finalization of a camera-ready document. G/DG reserves the right to send the document back to the contractor for corrections until it conforms to G/DG editorial guidelines and is ready to print.
G/DG may decide that a publication could be enhanced by preparing it in a form other than, or in addition to, the standard technical publication format. In these situations, contractor and G/DG staff will be invited to work together to explore publication options, and the G/DG information officer will be responsible for approving an alternative publishing format.

II. PRINTING AND DISSEMINATION

Printing

- Unless otherwise specified, G/DG is responsible for securing the printing and binding of publications.
- The quantity of in-house documents printed depends on the dissemination plan as determined in consultations between G/DG and the contractor.

Dissemination

- G/DG will formulate a customized dissemination list for each publication.
- If a G/DG contractor is responsible for disseminating copies of a publication, the G/DG COTR serves as the primary contact with the contractor.

III. DOCUMENT ORGANIZATION

All reports funded in whole or in part by G/DG should, unless otherwise noted, contain the following sections in the order shown. All sections from Contents to References/Bibliography should begin on right-hand pages. All sections of the Body of Report should use Level 1 (Roman Numeral) headings.

Cover
Inside Front Cover
Title Page
About This Publication
Acknowledgments
Contents
Executive Summary
Body of Report
Appendixes
Notes
References/Bibliography
Glossary of Acronyms and Abbreviations
Inside Back Cover
Back Cover

(Provided by G/DG)
(Provided by G/DG)
(Provided by G/DG, page i)
(Provided by G/DG)

(Page 1)
(Provided by G/DG)
(Provided by G/DG)
• Prior to printing, G/DG will add Cover, Inside Front Cover, Title Page, About This Publication, G/DG Foreword, Inside Back Cover, and Back Cover to the complete document.
• Use Arabic numerals for paginating, beginning with Executive Summary (page 1). Number pages in Appendixes, Notes, References/Bibliography, and Glossary of Acronyms and Abbreviations, consecutively following Body of Report.

Contents
• The table of contents should be given a standard chapter heading: Contents.
• Contents should include all first (chapter) and second level headings, annexes, and appendixes.

Executive Summary
• Publications should contain an executive summary capable of standing alone as a separate document. This summary should concisely present the key issues, methodologies, findings, and recommendations of the complete report. It should not be written as if it were a foreword, preface, or introduction. Rather, it should be thought of as a document that could be handed out at conferences, seminars, and workshops, or posted on a web page to give potential readers a good sense of the content of the paper, and to help decide whether to request a complete copy.

Body of Report
Refer to the sample document for an example of the effective use of bullets, boxes, and side-charts.

Appendixes
• Use the American spelling: Appendixes.
• Multiple appendixes should be delineated with letters (e.g., Appendix A: Populations of Countries Included in Study).

Endnotes and Footnotes
• Footnotes and endnotes should be indicated in the text with superscript Arabic numerals, in chronological order from beginning to end. For footnotes and endnotes, use 10 point Times New Roman. Footnotes should be placed beneath a thin rule on the bottom of the page where cited. The first line of footnotes should be indented, and there should be no extra space between footnotes. Endnotes go in a section titled Notes before References/Bibliography.

References/Bibliography
• Complete references for all citations should be included at the end of the report (following any appendixes and/or endnotes). If this section lists only publications cited in
the report, it should be called References. If it contains both cited and uncited publications, it should be called Bibliography.

Glossary of Acronyms and Abbreviations

- Publications with extensive use of acronyms and other abbreviations in textual and/or tabular material should include a Glossary of Acronyms and Abbreviation following References/Bibliography.

- Do not use acronyms and abbreviations gratuitously. The confusion from using obscure acronyms and abbreviations, even if they are defined once, is not worth the space saved. When acronyms and abbreviations are necessary, however, spell out the name or term on first occurrence, with the acronym or abbreviation immediately following in parentheses, e.g., an increase in gross national product (GNP). Use capital letters without periods between the letters. (Exceptions: U.K. and U.S., when used as adjectives, take periods.) If a name or term appears only once in a report, do not use the acronym or abbreviation.

Acknowledgments

- Acknowledgments should include a brief profile of the contractor, and a profile(s) of the author(s).

IV. GRAMMAR, STYLE, AND FORMAT

Titles and Headings

The Body of Report should follow the outline style presented below (titles are illustrative):

I. Introduction: Purposes and Use of the Guide
II. Lessons Learned
III. What is ADR
IV. What Can ADR Do?
V. The Limitations of ADR
VI. What Background Conditions are Important
   A. Adequate political support
   B. Supportive institutional and cultural norms
   C. Adequate human resources
   D. Adequate financial resources
   E. Parity in the power of disputants
      1. 
      2. 
      a) 
      b) 
      1) 
      2) 
      (a) 
      (b) 
      (i) 
      (ii)
Appendixes should be designated as: Appendix A; Appendix B; etc.

Grammar and Style

For all items of grammar and style not addressed in these guidelines, contractors should refer to The Chicago Manual of Style, 14th ed. 1993. Chicago: University of Chicago Press.

The appropriate acronym for the U.S. Agency for International Development is USAID. USAID headquarters in Washington, D.C., is abbreviated USAID/W. Missions are abbreviated, e.g., USAID/Ghana. The word “mission” is not capitalized unless referring to a particular mission, e.g., USAID Mission in Ghana.

Italics are used for titles of books and journals, unfamiliar foreign words, and words that require special emphasis. Bold type may occasionally be appropriate for highlighting specific recommendations and key terms.

Periods, colons, and semicolons are followed by only one space.

In a series of three or more elements, the elements should be separated by commas. A comma should be used before a conjunction when a conjunction joins the last two elements in a series.

In bulleted lists, initial cap each item in the list, even if the list is composed of one-word items.

If any item in a bulleted list is a complete sentence, use a period at the end of each. If no element in the list is a complete sentence, use no terminal punctuation.

Do not use semicolons and and to link items in a bulleted list.

Format

For the body typeface, use 11 point Times New Roman.

The Body of Report (but not the appendixes) should be in two column format.

There should be a half -inch space between columns.

All margins should be one inch.

Page numbers should be at the bottom of each page, flush outside (left on left-hand pages, right on right-hand pages). A footer repeating the chapter title should also be included. Footers are Arial 10, Bold.

• Do not use page numbers, headers, or footers on blank pages.

• Leave one space between paragraphs. Do not indent the first line of paragraphs.

• Use graphic elements including bullets, sub-headings, boxes, graphs, and charts to enhance the writing, draw attention to key ideas and make the document reader-friendly.