

Mr. Lee Zak
Zak and Associates
473 Kenton Drive
Irmo, SC 29063-2193



Visual Image Consultants

864 Park Street
Columbia, SC 29201-2426

February 4, 20--

Mr. Lee Zak
Zak and Associates
473 Kenton Drive
Irmo, SC 29063-2193

Dear Mr. Zak

The block format with open punctuation illustrated in this letter is the format that we recommend for your company. This efficient format positions all lines at the left margin. With open punctuation, no punctuation is used after the salutation or the complimentary close.

Word 2010 and Word 2007 use the same defaults. The line spacing is 1.15, and the spacing after paragraphs is 10 points. With short lines such as the letter address and the name and title, the extra spacing after the paragraph needs to be removed. The spacing between the date and inside address and between the complimentary close and writer's name requires you to tap enter twice. Tap enter once after all other letter parts.

Please note the content and format of the closing lines. Sincerely is the complimentary close that we recommend, and the name and title illustrate the format we recommend. The initials xx represent the first and last initial of the person keying the letter. We also recommend that you standardize this format and ask all employees to use it. When we conduct the training session for your employees, we will teach them how to save the standard closing lines for their letters as a Quick Part that can be inserted with one click. Using this Word 2010 command can improve productivity significantly.

Mr. Zak, we look forward to meeting with you to finalize all of the design changes that we have discussed and to conducting the training for your staff.

Sincerely

Lynn T. Wells
Managing Partner

xx

Ms. Janice R. LeRuth
Manager, Human Resources
Marcus Tools, Inc.
3764 W. Wall Street
Midland, TX 79703-7710



Taylor HR Systems

4400 Wilshire Drive | Midland, TX 79703-6949 | 432-555-0127 | (F) 432-555-0138 | www.taylorhrs.com

Current date

Ms. Janice R. LeRuth
Manager, Human Resources
Marcus Tools, Inc.
3764 W. Wall Street
Midland, TX 79703-7710

Dear Ms. LeRuth

Thank you for inviting us to make a presentation on our new software designed to help your employees understand your benefits program and make informed decisions based on the options available to them. The latest version has new features that extend the capabilities of your current software significantly.

You suggested that we make the presentation on Thursday of next week at 2:30 p.m. That time works well for us. We plan to begin with an overview of the system followed by a complete demonstration of the new features. Then we will close with a cost analysis, recommendations for implementing the system, and a tentative schedule.

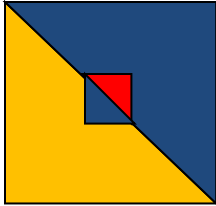
I will call you later this week to verify that this approach meets your needs. We look forward to meeting with your team next week.

Sincerely

Ralph C. Baker
Systems Manager

xx

c Lynn Fox, Systems Analyst



Zak and Associates

473 Kenton Drive | Irmo, SC 29063-2193 | 803-555-0144 | www.zakandassociates.com

TO: All Employees

FROM: Lee Zak

DATE: Current date

SUBJECT: Memo Format

Most of you are aware that we have been working with Visual Image Consultants to help us improve our brand identity. The Executive Team has enthusiastically endorsed the standard document formats they proposed. This memo and the attached one illustrate the format that we will use for all memos. We elected to use our logo and headquarters address since we send memos to all of our offices in the region. Often our representatives share communications sent to them from headquarters with their customers.

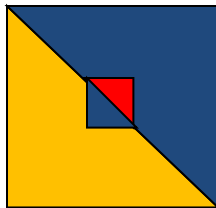
Word 2010 has been installed on every computer. A few of you previously used Word 2003. We really like the 1.15 line spacing and the extra space after paragraphs. These defaults enhance the readability of our documents. To format the heading, we simply tap enter after each line. We also ask that each assistant who keys memos for our engineers and technical staff add their reference initials (first and last initials) as shown at the bottom of this memo. Enclosures, attachments, and copy notations are also positioned below the reference initials as shown on this illustration.

Our executive assistant, Leslie West, will provide each of you with a template that has the heading so that you will not have to key it each time you prepare a memo. At our training session, you will also learn how to save the heading as a Quick Part so that you can insert the heading with just one click. The schedule is also attached. One of our goals is to increase our productivity as well as enhance the image of our documents.

lw

Attachments: Memo
Training Schedule

c Lynn T. Well, Visual Image Consultants



Zak and Associates

473 Kenton Drive | Irmo, SC 29063-2193 | 803-555-0144 | www.zakandassociates.com

TO: Rex Project Team

FROM: Jan Bennett

DATE: Current date

SUBJECT: Client Follow-up

The plans and drawings for the Rex Project that were approved by our team at our last meeting were submitted to Bill Rex the next day. Bill called me today to indicate that his group was very pleased with the first draft. He indicated that they would like to meet with our team to go over a few changes that need to be made.

Bill requested that we meet at the Rex Plant to review some of the specifications that they have finalized. The meeting is tentatively scheduled for next Tuesday at 2:30 p.m. I will arrange to use the company van so that we can all go together. We will need to meet in the lobby of our building at about 1:45 p.m.

Please let me know if you will be able to attend the meeting. This meeting will be an important one, and I hope everyone will be able to attend.

xx



R&M Mountain Property Consultants

4234 Fort Henry Drive | Kingsport, TN 37663-2228

423-555-0167 | www.r&mmountainproperty.com

June 11, 20--

Ms. Margaret V. Glenn, Director
Mountain View College Foundation
586 West Elk Avenue
Elizabethton, TN 37643-2528

Dear Ms. Glenn

This letter provides a report of my June 7 trip to Roan Mountain, Watauga, and Johnson City to evaluate the three parcels of property that donors have proposed giving to the Mountain View College Foundation.

Roan Mountain Property—this 200-acre tract of land is located near Roan Mountain State Park with its famed Rhododendron Gardens. The property has been in the family of the proposed donor for several generations and has never been placed on the market. Portions of the property have been used for tree farms in the past. The trees on these farms have not been tended or harvested since the donor became a widow approximately ten years ago.

Considering its location, it is not likely to have any environmental problems nor does it have any wetlands on the property. The property appears to have significant value as a tree farm or for future development. East Tennessee Appraisal Services has been commissioned to appraise the property and provide us with a current appraisal based on its highest and best use. This property should be accepted.

Watauga Property—this 25-acre tract has approximately one thousand feet of frontage on deep water on the Watauga Lakes. The setting for this tract of land is breathtaking. It would be ideal for development, and if developed properly, could be very valuable. Local citizens indicated that the family had been approached on numerous occasions to sell the property, but they declined all offers.

East Tennessee Appraisal Services has been commissioned to appraise the property and provide us with a current appraisal based on its highest and best use. This property should be accepted immediately. There is no downside to accepting this property.

Johnson City Property—this property consists of four lots that were acquired through foreclosure proceedings. The lots are located near an industrial area that could easily have environmental contamination. The property could best be described as depressed. Area citizens indicated that the property had been on the market for approximately two years and appeared to attract very little interest from potential buyers.

Ms. Margaret V. Glenn, Director

Page 2

June 11, 20--

The property should not be accepted without appropriate environmental testing. It is also doubtful that a clear title could be obtained. Based on the poor condition of the property, it did not appear prudent to order an appraisal of the property. The best course of action may be to decline this proposed gift.

A more complete description of the properties is attached. As soon as I receive the appraisals of the Roan Mountain and Watauga Lakes properties, I will schedule an appointment to provide you with my recommendations for the properties.

Sincerely

Russell M. Rockafellow

Partner

xx

Enclosure: Description of Properties

c Richard R. Meekins



XYZ Corporation

Human Resources Division

TO: Mason M. McLendon

FROM: Student's Name

DATE: Current date

SUBJECT: Effective Time Management

At our last meeting, you asked me to share my thoughts on ways to manage time effectively and to summarize guides that I believe should be incorporated in our new Management Training Program. This memo contains my thoughts on the topic and the key elements that I believe we should emphasize in the program. I have also attached a handout that Lee Sanderson and I used in a previous training program.

Time is an interesting concept to study because it is one of the few resources that is distributed equally. Everyone has exactly the same amount of time. Effective time management focuses on how time is used.

Successful people often share a common trait—they use their time effectively and they respect the time of others. Using time effectively requires both a healthy attitude about time and many time management skills.

Good time managers understand and appreciate the value of time and desire to use it effectively. Respecting the time of others is a part of that attitude. If you cannot meet a deadline, letting the person involved know ahead of time enables him or her to take action to minimize the effects of your being late. Being proactive and informing people before a deadline takes far less time than being reactive and trying to explain why you did not do what was expected.

The skills needed to manage time are being able to assess what is really important, being able to judge how much time to spend on something, and being able to prioritize. Effective use of time requires you to focus on the top priority at the moment and to avoid distractions, even when they are interesting and enticing.

How much time it takes to complete a given task often depends on the resources that are available and how effectively those resources are used. Resources include people, tools, information, money, and a host of other assets. Too often people spend time trying to figure out how to do something rather than seeking help from someone who has the requisite knowledge or tools and would willingly assist with the task.

Mason M. McLendon

Page 2

Current date

Good planning and organization enhance the ability to accomplish a task. Working smarter produces better results than just working faster or harder.

Specific guides for managing time effectively are summarized below.

1. List the things that have to be done. List everything that is important.
2. Classify the things that have to be done into three or four groups based on their priority.
3. Complete the tasks with the highest priority first. Then move to the next level and do those things. Follow this procedure until you have completed all tasks.
4. Handle paper only once. Going through documents and putting them back on the desk to deal with later often requires more time than completing the tasks right away.
5. Be organized. Much time is wasted looking for things.
6. Prepare a schedule and stick to it.

Good time management is important. It ensures that we do the important things first and that we plan time for all the things that are truly important to us, including leisure and fun activities.

Attachment: Handout

c Lee Sanderson

| ANNUAL SALES BY REGION | | | | | |
|------------------------|------------|------------|------------|------------|------------|
| Region | Quarter 1 | Quarter 2 | Quarter 3 | Quarter 4 | Annual |
| North | 3,985,678 | 2,489,956 | 3,563,098 | 2,639,034 | 12,677,766 |
| South | 4,140,842 | 3,987,042 | 2,845,016 | 3,092,587 | 14,065,487 |
| East | 2,536,820 | 3,750,023 | 5,092,120 | 3,062,034 | 14,440,997 |
| West | 3,712,083 | 2,435,762 | 3,742,831 | 2,985,824 | 12,876,500 |
| Totals | 14,375,423 | 12,662,783 | 15,243,065 | 11,779,479 | 54,060,750 |

COMPETITIVE RESTAURANT ANALYSIS

| Restaurant | Number of Ratings | Quality Rating (High 4) | | | |
|--------------------|-------------------|-------------------------|----|---|---|
| | | 4 | 3 | 2 | 1 |
| Abbott Seafood | 38 | 20 | 12 | 6 | 0 |
| Chez Patrick | 34 | 24 | 10 | 0 | 0 |
| Ristorante LaMarca | 40 | 26 | 11 | 2 | 1 |
| Redman Steak House | 32 | 10 | 12 | 6 | 4 |
| Yen's Garden | 38 | 14 | 12 | 8 | 4 |

Note: Styles and formatting will vary.

SALES SUMMARY

| Quarter | Equipment | Supplies | Total Sales |
|---------|-----------|----------|-------------|
| First | 219,475 | 108,963 | 328,438 |
| Second | 238,907 | 125,872 | 364,779 |
| Third | 240,106 | 138,760 | 378,866 |
| Fourth | 230,437 | 132,694 | 363,131 |
| Total | 928,925 | 506,289 | 1,435,214 |

Business Reports

Writing and Formatting

Reports provide information used to make decisions or to document activities, events, or transactions. Organizations use both internal and external reports for problem solving. Appropriate formatting not only makes a good first impression; it enhances the readability of a report. Internal reports should be written and formatted with the same care and attention that external reports receive. Reports move up the organizational hierarchy and can have a very positive impact on career upward mobility.

Components of a Report

Reports typically contain the following components: identifying information, purpose, methods, data analysis, conclusions, recommendations, and a summary. Depending on the length of the report these components may be separate, or they may be combined.

Identifying Information

Most of the identifying information is contained on the cover page of a report. It may also be placed in a cover letter or in the body of the report.

Purpose

The purpose explains why the report is being written and what objectives are expected to be achieved by writing the report. A purpose clearly stated sets the tone for the remainder of the report.

Methods and Data Analysis

The methods section describes the process used to collect data and analyze the data. The data analysis consists of a discussion of the facts and how they can be interpreted to solve the problem.

Conclusions, Recommendations, and Summary

Conclusions are the results obtained by analyzing and interpreting the data. Recommendations are actions suggested based on the conclusions. The summary presents the highlights of the report.

Cover Page

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Recreation Complex

The Executive Committee **authorized** a study of the Recreation Complex project that was begun 18 months ago. The study has been completed, and the results are summarized in this report.

Project Status to Be Determined

The purpose of this report was to determine the status of the Recreation Complex project and the total cost of the project. The Human **R**esources Department initiated the project to complement the Conference Center. It is also designed to provide all Reddman employees with a family-friendly environment for evenings and weekends. Employees have requested that a swimming pool be added to the project. The project is located on the 150-acre Reddman Corporation campus near the Conference Center.

Construction and Cost Data Needed

The internal project manager is no longer with Reddman Corporation; therefore, construction data had to be obtained **from** the supervisor who reported to the project manager and directly from the construction company. Records documenting expenditures **were** available, but sources of funds to cover the excess expenditures were not identified in the records. The project manager was also responsible for coordinating and overseeing the project budget.

Analysis of Financial and Construction Data

The budget for the construction project was \$640,000. The equipment and furnishings were budgeted at \$60,000. The expected completion time was one year. The following table shows a comparison of the budgeted costs and the actual cost for each segment of the project.

| Recreation Complex Budget and Actual Expenditures | | |
|---|---------------------|---------------------|
| Project Segment | Budget | Actual Expenditures |
| Open pavilion | \$ 90,000 | \$134,375 |
| Parking lot | 40,000 | 37,948 |
| Recreation building | 275,000 | 298,492 |
| Playing fields | 150,000 | 165,764 |
| Walking and bicycle trails | 85,000 | 120,000 |
| Total | \$640,000.00 | \$756,579.00 |

The expenditures on the project were \$116,579 more than the project budget. The cost of all project segments exceeded the budget except for the parking lot, which was \$2,052 under budget. Currently the account shows a deficit, and the furnishings and equipment have not yet been purchased. The sources of additional funding have not yet been identified.

The project took approximately eight months longer than expected for completion, and prices escalated significantly during that time period. Change orders on the size of the open pavilion also accounted for significant cost increases. Cost estimates for the swimming pool that managers and employees have requested have not been obtained.

Conclusions on Status and Costs

The Recreation Complex construction has been completed, but the facility is not functional without the furnishings and equipment. Equipment and furnishings have not been purchased. Adding a swimming pool at this time would compound the funding problem. The main issue that must be resolved is finding a source of funds to cover the deficit.

Recommendations for Action

Two options are recommended to solve the funding problem. The first option is to assess a one-time usage fee to each department to cover the costs, since all employees have access to the complex. The second option is to charge the Conference Center's budget for next year. The swimming pool should be deferred until funds to cover costs have been identified. Furnishings and equipment should be purchased immediately. A manager should be designated to oversee the purchase and ensure that the budget is not exceeded.

Standards of Attire and Professional Image

A major goal of the Board of Directors of Glenn and Hess Associates is to enhance the professional image of Glenn and Hess Associates. The Board believes that many factors influence professional image including dress standards for employees, appearance of the entire work environment, the appearance of all documents and publications, and the manner in which employees conduct themselves with clients. The Board requested that management begin the process by making recommendations to establish a code of dress for employees. Currently, many employees wear relatively casual attire. Some concern has been expressed about the possibility of casual attire creating an unprofessional image for the agency.

Establishment of Dress Code

The purpose of this report is to benchmark selected companies and to determine the views of clients and employees about appropriate attire for employees. The data will be used to recommend an appropriate dress code for employees of Glenn and Hess Associates.

Sources of Data on Appropriate Attire

Three data sources provided the information used to make judgments about appropriate attire for employees of Glenn and Hess Associates. These sources included the following:

- Observations from 15 benchmark companies.
- Client interviews.
- Discussions with employees.

Data Analyzed by Source

Data from all three sources were analyzed. The approach for acquiring the data from the three sources is described in the following section.

Benchmark Companies

Benchmark companies were selected by senior managers based on three criteria — being a direct competitor, sharing some of the same clients, and reputation in the local area. A study team composed of local MBA students was hired to collect data from benchmark companies. The

team did direct observations, interviewed employees, and obtained written policies specifying dress from the companies that had written policies.

In 12 of the 15 benchmark companies, managers and sales staff wore professional attire. Men wore coats and ties, and women wore business suits or tailored dresses. Attire worn by office staff also was professional but a little less formal. The attire of technical people tended to be more casual than that of other employees. In most cases, men wore slacks with shirts that had collars, and women wore slacks or skirts and blouses. In three companies, employees did not dress as professionally as those in the other nine companies did. A few employees wore jeans or jogging outfits.

Six of the companies surveyed observed casual Fridays. However, three of the companies reported that they are planning to eliminate them.

Clients

The clients contacted had strong preferences about professional attire in the office. The following chart summarizes their preferences:

| Client Preferences on Attire | |
|------------------------------|-----|
| Professional | 75% |
| Casual | 15% |
| No preference | 10 |

Most of the clients who were surveyed indicated that they preferred to deal with companies whose employees had a professional appearance. A few clients preferred casual attire or did not have a preference.

Employees

The preferences of employees about professional attire were mixed. The following chart summarizes their preferences:

| Employee Preferences on Attire | |
|--------------------------------|-----|
| Professional | 55% |
| Casual | 35% |
| No preference | 10% |

Recommendations

The proposed dress code for Glenn and Hess Associates divides employees into two categories:

1. Employees who have contact with clients should wear professional attire – coats and ties for men and suits or tailored dresses for women.

2. Employees who do not have contact with clients may dress more casually; slacks and shirts with collars for men and slacks or skirts and blouses for women would be appropriate.

Fridays are acceptable as casual days provided the employee has no contacts scheduled with clients. Jeans, T-shirts, shorts, and jogging outfits are not acceptable at any time. The issue concerning casual Fridays merits additional study.

The attire recommended would enable Glenn and Hess Associates to project a more professional image that is comparable to benchmark companies and that meet the expectations of clients.

Glenn and Hess Associates

Standards of Attire and Professional Image

Client Expectations – A Professional Image
from Glenn and Hess Associates

Student's Name

Standards of Attire and Professional Image

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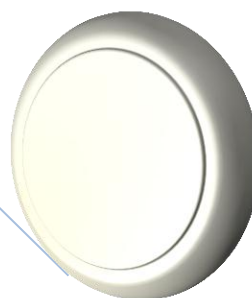
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Recreation Complex

Project Status

Student's Name

5/4/20--

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2011

Feasibility of the Telemedicine Center

Todd Medical Center Project

Student's Name

Current date



Feasibility of the Telemedicine Center

Providing medical care in rural communities is becoming increasingly difficult. Many small communities are unable to provide the type of environment that is conducive to attracting physicians in a variety of medical specialties to live and practice medicine in the community. Telemedicine centers provide **an** alternative that uses sophisticated technology to provide rural communities with access to physicians in various medical specialties who are located in medical schools and in large hospital centers.

Proposed Telemedicine Centers

The purpose of this study is to evaluate the results of the one-semester pilot telemedicine program **in** a rural area to determine whether it should be continued and expanded to the three programs originally proposed. Prior to making the investment in the technology required for three centers, one pilot program was established to determine its feasibility and its acceptance in the community.

The telemedicine center **consists** of a small clinic equipped with the technology that enables physicians from Todd Medical School (TMS) to view patients, communicate directly with them during medical procedures, and to receive the results of sophisticated medical tests as they are being performed. Four interns and one resident staff the center and perform a variety of medical procedures that are directly supervised by TMS physicians.

Assessment Data

Two types of data were collected for the assessment of the pilot program: technical assessment data and community acceptance data.¹

Technical Assessment Data

The equipment met all expectations, and physicians were able to get all of the relevant data needed for diagnosis. Having interns working with the patients and providing information directly to the supervising physicians worked extremely well. The interns benefitted from having a more experienced person working with them, and the resident benefitted from the team leader experience. The resident and the interns were pleased with the varied medical experience they received.

¹ All data were collected and analyzed by the Rexmere Market Research firm.

Community Acceptance Data

Community leaders and patients were interviewed to determine **their** reaction to the telemedicine center. Community leaders had been frustrated because they were unable to attract physicians other than family medicine practitioners needed to provide appropriate care for the citizens of the community.

Patients who were skeptical at first were very pleased with the medical care they received with the assistance of technology. They were extremely pleased to have the resident and interns living in their community and assisting with the care they were provided.

Final Assessment of Pilot Center

All of the data were analyzed carefully, and everyone involved came to the conclusion that the pilot telemedicine center had met and exceeded expectations. The quality of medical care provided was excellent, and the patients and community were very satisfied with the center.

The equipment worked effectively and was very cost effective. The resident and interns received great training and experience, and the patients were provided with excellent medical care.

Recommendation to Establish Three Centers

The pilot telemedicine center demonstrated that this alternative is a cost-effective way to provide appropriate medical care in areas that have a shortage of **physicians**. The three locations identified for centers meet all criteria, and the centers should be established.²

² Todd Medical Center has its share of the costs allocated in the budget. Both communities have raised almost all of the funds required for their investment in the project.



Creative Designs & Production, LLC

TO: Lori Maxwell and Jeff Maxwell

FROM: Student's Name

DATE: Current date

SUBJECT: Site for the School Spirit PSA Filming

The Coastal Virginia University advancement administrators recommended that we contact Dr. Joyce Martinez and her husband, Esteban, about using their home as the setting for the filming of the School Spirit public service announcement that will be shown during the half-time of all televised football and basketball games as well as during other sporting events.

Dr. Martinez, executive director of the CVU Foundation that is contracting with us for the filming of the PSA, had been briefed by her colleagues about the PSA story line and that the Martinez home had been suggested as a potential site for the filming if they were willing to make it available. She was most cordial when I contacted her and agreed to our request to send Dan Holland to take pictures to determine if the site met the technical specifications. I arranged for Dan to make the site visit today and take the pictures. They have been posted on his website along with his scouting notes. He is very enthusiastic about the potential of this site.

Esteban Martinez will coordinate all activities at the Martinez home for this project. He understands that the preliminary work on the set will require about four hours on one day and that the filming will require eight to ten hours on the next day. He is also aware that the project is scheduled to be filmed within ten days. This schedule is acceptable to him.

c Steve Johnson



Creative Designs & Production, LLC

1776 Robin Hood Road | Richmond, VA 23220-1012 | 804-555-0134 | Fax: 804-555-0196 | www.cdp-va.net

Current date

Dr. Joyce Martinez, Executive Director
Coastal Virginia University Foundation
1164 King Carter Drive
Irvington, VA 22480-2504

Dear Dr. Martinez

Our discussions were most productive, and we have finalized the contract for the filming of two 30-second public service announcement spots for Coastal Virginia University. All of the changes that you requested have been implemented in the contract.

Please note that 50 percent of the contract cost is due when the contract is signed, and the remaining 50 percent is due when you approve and accept the final product. Please return the contract within three days with your check for \$44,000. You were provided a significant discount as a nonprofit organization and because you agreed to using your home as the set for these spots.

We look forward to working with you to produce a public service announcement that we believe will change the standard the industry uses for these unique opportunities to showcase your university on regional or national television. We appreciate your willingness to grant us the latitude to be truly creative with this exciting venture.

Sincerely

Steve Johnson
Business Manager

xx

Enclosure: Contract

SCHEDULE FOR FILMING SCHOOL SPIRIT PSA

| Time | Activity | Participants | Person Responsible |
|-------------|--|--|--------------------|
| 8:00–10:00 | Set preparation | Technical crew | Todd Marshall |
| 8:30–10:00 | Lighting assessment and implementation | Lighting crew, film director, creative director | Josh Feldstein |
| 8:30–10:00 | Sound assessment and implementation | Recording crew, film director, creative director | Lisa Sexton |
| 9:00–10:00 | Final rehearsal | Actors and producer | Jeff Maxwell |
| 10:00–10:30 | Break | All | Student's Name |
| 10:30–11:00 | Final check | All technical crews, wardrobe and make-up crew | Lori Maxwell |
| 11:00–11:30 | Rehearsal filming PSA Spot 1 | All | Jeff Maxwell |
| 11:30–1:30 | Film PSA Spot 1 | All | Jeff Maxwell |
| 1:30–2:15 | Lunch | All | Student's Name |
| 2:15–2:45 | Rehearsal filming PSA Spot 2 | All | Jeff Maxwell |
| 2:45–4:00 | Film PSA Spot 2 | All | Jeff Maxwell |
| 4:00–5:30 | Tear down set and restore environment | All | Todd Marshall |



Creative Designs & Production, LLC

1776 Robin Hood Road | Richmond, VA 23220-1012 | 804-555-0134 | Fax: 804-555-0196 | www.cdp-va.net

Current date

Mr. Josh Feldstein
Feldstein Productions, Inc.
587 N. Rodeo Drive
Beverly Hills, CA 90210-3206

Dear Josh

Thank you for rearranging your schedule to fly in from the West Coast to direct the filming of the "School Spirit" public service announcement for us. This project was particularly important to us and to Coastal Virginia University because it is a significant departure from the typical public service announcement used during televised college sports events. This letter provides the summary you requested of the reasons we chose the story line and the impact that we think it will have on the industry. We will send you a copy of the product as soon as it is finalized. You can access the draft on our website with the password we gave you. I think your clients on the West Coast will be very receptive to products of this type.

Both national and regional networks provide each university with the opportunity to provide a 30-second public service announcement about the university. The typical spot usually consists of the president of the university talking about academics, research, and student achievements. The research that we have done shows that many sports fans find the material boring and remember relatively little of the content of the public service announcement about their university.

The fine line between a commercial and a public service announcement is becoming blurred. We believe the networks will be amazed at the appeal this spot will have for prospective students, current students, parents, and alumni. In addition, we think viewers who have no allegiance to the University will also watch it. The initial reaction we have had to the previews is that both students and adults find it to be extremely funny and at the same time it delivers the message university administrators wish to convey about the academic side of the university. We believe that it is more effective than most of the commercials that are aired during professional sports events. This type of public service announcement has the potential of changing the culture of the industry.

You were correct in your assessment that the large, comfortable recreational room on the lower level of the Martinez home provided a better setting than the upscale main floor. Rarely do we have the luxury of more space than we need when we film in a "home" setting. The simple set of the old, gold couch

Mr. Josh Feldstein

Page 2

Current date

that had been hidden away, the small coffee table, a bowl of popcorn, and cold drinks added more realism of watching a sporting event than we thought possible.

The last-minute change to include Andy in the spot with the three actors worked out beautifully. He is a precious dog and will be a hit with the audience. We were amazed as were Mr. and Mrs. Martinez that he wore the bandana and sat still during the many hours of filming.

The second spot was really a bonus. I was astounded that Lisa was able to play both the younger sister of a college student and his grandmother with only a 30-minute makeup and wardrobe change. Bringing the talent in from Atlanta and Charlotte proved to be a very good investment.

Again, thank you for the excellent work you did on this project. We look forward to receiving your critique of the final product.

Sincerely

Lori Maxwell

Creative Director and Manager

xx

School Spirit Project

The School Spirit project for Coastal Virginia University has been completed and delivered to the client. This report provides the required project **summary** with all components **except** the final budget analysis.

The primary deviation from the original plan was the filming of a second spot using the same set, crew, talent, and story line. The role of the actress changed from portraying the younger sister of a student and his friend watching a ballgame to portraying the student's grandmother.¹

Six days were **budgeted** for pre-production planning. The first **site** scouted proved to be an ideal location—from the perspective of size, suitability for filming, furnishings, and cost. An employee of the client made her home and furnishings available for the set at no charge. The client's media relations staff had already prepared the content of the message. All pre-production work was completed in less than four days.

The creative director was enamored with the family pet and requested permission to include him in the spot. The family agreed provided that Andy would cooperate—which he did. A total of 12 hours **was** allocated for rehearsal filming and actual filming. The first spot was completed in seven hours. The director and producer agreed to film a second spot with a very similar story line. The second spot only required two hours to film.

Actual production costs did not deviate from the budget. Wardrobe, catering, equipment rentals, and all labor costs matched the estimated costs. Travel, per diem, and other expenses appear to be in line with estimates.

In addition to the technical work, the post-production work included reviews by two focus groups prior to the preliminary review by the client. Both reviews were very positive. The post-production work was accomplished in four days.

The client expressed complete satisfaction with the product and considered the second spot that was filmed at no extra cost to be a significant bonus. Several invoices are outstanding; therefore, the final budget has not been prepared. However, since rental costs for a studio were not incurred and all phases of the project were completed in less time than budgeted, this project will definitely be under budget with no sacrifice in quality whatsoever. This project is the third one completed for Coastal Virginia University, and CDP can expect to contract with them for another project with two spots within the next six months.

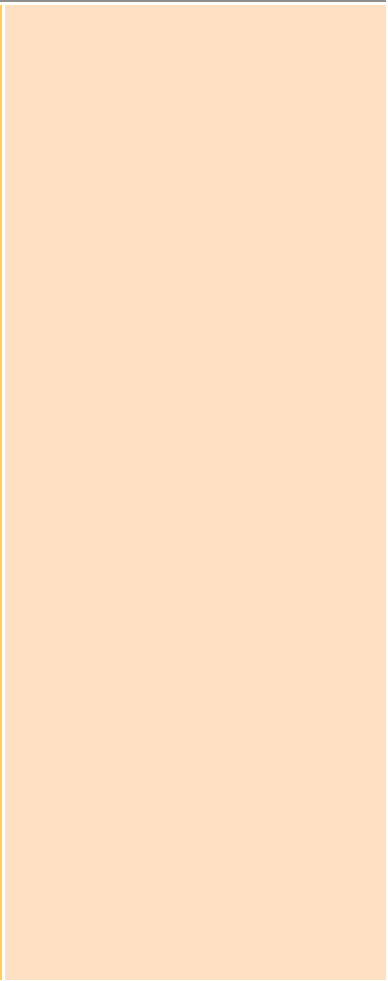
¹ Both spots were filmed in less time than was budgeted for the original plan; therefore, the only added cost was for the additional media for filming in high-definition format.



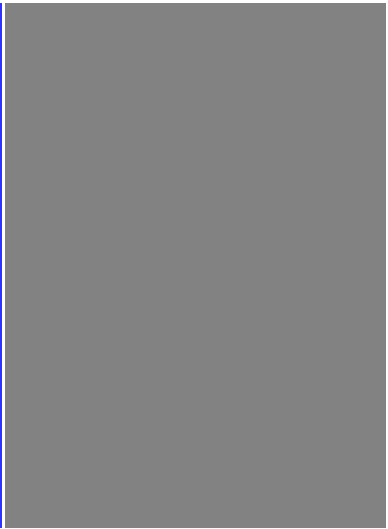
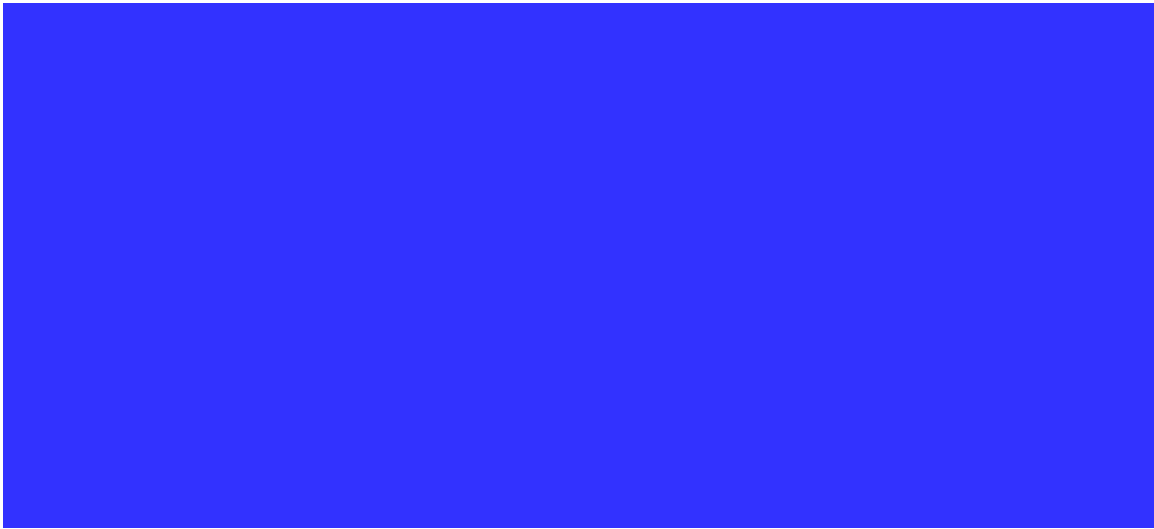
School Spirit Project

Project Completed and Delivered

Student's Name



2011



School Spirit Project

The School Spirit project for Coastal Virginia University has been completed and delivered to the client. This report provides the required project summary with all components except the final budget analysis.

Project Description

The primary deviation from the original plan was the filming of a second spot using the same set, crew, talent, and story line. The role of the actress changed from portraying the younger sister of a student and his friend watching a ballgame to portraying the student's grandmother.¹

Pre-Production Plan

Six days were budgeted for pre-production planning. The first site scouted proved to be an ideal location—from the perspective of size, suitability for filming, furnishings, and cost. An employee of the client made her home and furnishings available for the set at no charge. The client's media relations staff had already prepared the content of the message. All pre-production work was completed in less than four days.

Production

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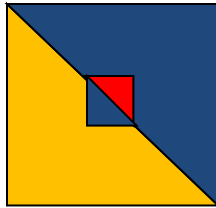
¹ Both spots were filmed in less time than was budgeted for the original plan; therefore, the only added cost was for the additional media for filming in high-definition format.

Post-Production Work

In addition to the technical work, the post-production work included reviews by two focus groups prior to the preliminary review by the client. Both reviews were very positive. The post-production work was accomplished in four days.

Potential for Future Business

The client expressed complete satisfaction with the product and considered the second spot that was filmed at no extra cost to be a significant bonus. Several invoices are outstanding; therefore, the final budget has not been prepared. However, since rental costs for a studio were not incurred and all phases of the project were completed in less time than budgeted, this project will definitely be under budget with no sacrifice in quality whatsoever. This project is the third one completed for Coastal Virginia University, and CDP can expect to contract with them for another project with two spots within the next six months.

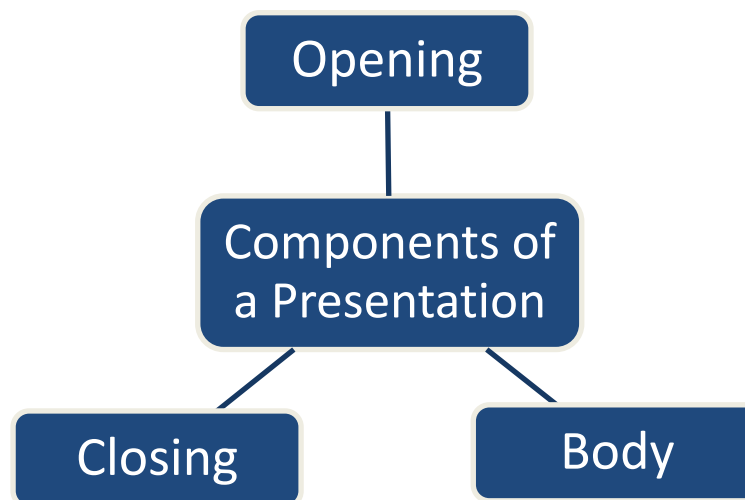


Zak and Associates

473 Kenton Drive | Irmo, SC 29063-2193 | 803-555-0144 | www.zakandassociates.com

TO: Nan Leppard
FROM: Student's Name
DATE: Current date
SUBJECT: Graphics for Training Session Handout

You asked me to prepare three graphics to illustrate three concepts that we could include in our Delivering Effective Presentations for Managers handout. I have given considerable thought to the concepts we talked about emphasizing. One concept we want to illustrate is the idea that presentations should be prepared as three separate components with the opening to create a good impression, the body to provide the details, and the closing to accomplish the objectives or secure the action desired. My suggestion is to use a Radial Cluster SmartArt graphic similar to the one illustrated below to introduce the concept.

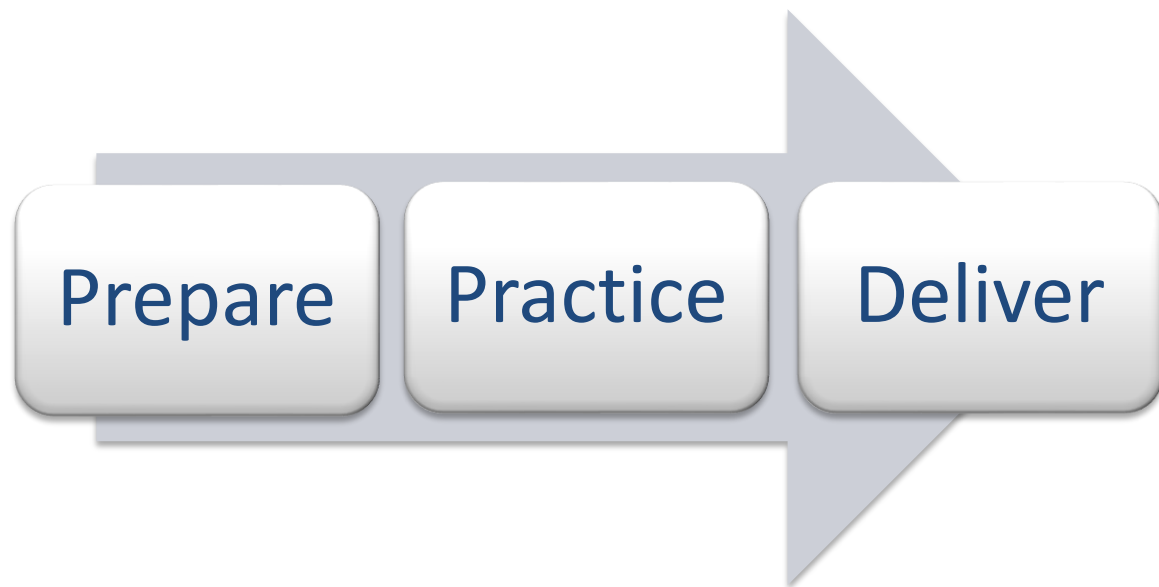


Another concept that we want to illustrate is that most people cannot just get up and deliver an effective presentation off the cuff. Good speakers prepare adequately, practice or rehearse often asking for critiques from colleagues, and then deliver the presentation confidently. My suggestion is to use a Continuous Block Process SmartArt graphic similar to the one illustrated on the next page to introduce the concept.

Nan Leppard

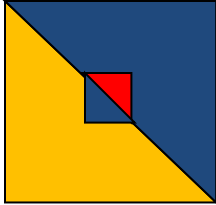
Page 2

Current date



The last concept we wanted to illustrate included things that affect the delivery of a presentation. Ideas we discussed were smiling and being positive as you deliver a presentation, stop focusing on our needs and focus on the needs of the audience, and you will be the star of the show. This concept was a little more difficult to design—but the shapes shown below may be a way to get the message across.





Zak and Associates

473 Kenton Drive | Irmo, SC 29063-2193 | 803-555-0144 | www.zakandassociates.com

TO: Nan Leppard
FROM: Student's Name
DATE: Current date
SUBJECT: Pictures for article

You asked me to research our files and try to locate an appropriate picture for an article you are sending to executives on home entertainment for business. I have selected the two pictures below. The first shows an elegant dining room prepared for entertainment. The second picture was selected to show that you do not need to have a huge home to entertain effectively. You may not need this one. I compressed both pictures to reduce the file size and cropped the second picture about an inch on the bottom and about a quarter of an inch on the right and left sides to focus only on the house; then I sized both pictures about 4" wide for comparison purposes and centered them.

The third picture is from clip art. I found it using *set table in restaurant* as the keywords. I sized it 4" wide and centered it as well. However, I do not think it is nearly as effective as the first picture.



Nan Leppard
Page 2
Current date



Business Entertaining

Business entertaining is both an art and a science. Businesses typically entertain in two ways: small dinners or events in which specific business is discussed and large group functions that are designed to enhance public relations. The entertainment site may be in the company facilities, in commercial establishments, or in the home of a company executive.

The cost of entertaining in commercial sites and the cost of a catered function in a home may be comparable. Many business clients, however, react more positively to being entertained in the home of a company employee. The personal touch means a lot in business.

The science is the easy part—it consists of:

- Knowing what food and refreshments are enjoyed most at receptions, meals, and other functions.
- Knowing where to get the refreshments or how to prepare them effectively.
- Knowing how to ensure that they are served appropriately and at the correct temperature.

Another significant aspect of business entertaining relates to knowing how to get the most out of the budget that is allocated for the event. Many businesses spend a substantial amount of money entertaining, but they do not get the quality or the ambience that is equivalent to the price they paid.



The art of entertaining may add little or no cost to a function, but may make the difference in whether the event is considered a memorable one or just another routine business function.

The art of entertaining includes many little but very important things, such as:

- The artistic display of the table.
- The presentation of the food.
- The manner in which servers interact with guests.
- The ease with which food is served and used items are removed from the area.
- The ease with which guests can flow from one area to another.
- The graciousness of the host and hostess.

Newspaper-Style Columns

Text that spans more than one column is called a banner or a masthead. The banner is usually formatted in large, bold type or by using WordArt.

Text can be formatted in one column or in multiple columns. Tables are an example of formatting text in columns and rows. A newspaper is an example of formatting text that is read down one column and then to the top of the next column and down it.

Newspapers and magazines typically use pull quotes to emphasize particular information and to add interest and variety to the document. Pull quotes “pull” a sentence or quote from the article that is pasted in a formatted text box to call attention to it. Many magazines and some newspapers also use sidebars. Sidebars, as the name suggests, are generally positioned in the side margins and provide information separate from but related to the content of the document.

Column sizes can be equal, or the size of each column can vary. Equal-size columns can be

formatted by clicking Columns on the Page Layout tab. Unequal-size columns must be formatted using the Columns dialog box, which is accessed by clicking More Columns on the Columns options.

Newspapers and magazines typically use pull quotes to emphasize particular information and to add interest and variety to the document.

Columns can be keyed in Print Layout view, or the text can be selected and the Column format applied. To format a simple document with equal-size columns, it is easier to key the text, select it, and then

apply the column format to the selected text.

To balance the columns or have them end at the same point on the page, insert a Continuous section break at the end of the columns.

Visual Image Consultants provided the information in this newsletter to us as an example to show our staff. We have retained Visual Image Consultants to assist us with standardizing our document formats and improving our image.

Visual Image Consultants is currently custom designing several pull quote and sidebar text boxes that we can save as Quick Parts.

Portfolio Structure

Asset Allocation

Student's Name



11

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Portfolio Structure

Asset Allocation

The Executive Committee of the Rexmere Foundation requested that Fund Investment Consultants, Inc. prepare a report on the Foundation's portfolio structure. Fund Investment Consultants was also asked to present the report first to the Investment Committee and then to the Board of Directors.

Expected Outcomes

The purpose of the study is to analyze the structure and weighting of the current asset allocation to determine if it is still appropriate in light of changing economic conditions. Both returns and level of risk should be evaluated in light of any recommendations for changes in the asset allocation. The ultimate goal is to recommend an asset allocation that would provide the highest returns with an appropriate level of risk for the Foundation portfolio.

Current Structure Analysis

Two types of data were collected and analyzed—the returns and the risk associated with each asset class historically and the returns and the risk associated with the asset classes in the current portfolio. The results from these analyses were then analyzed in light of current and projected economic conditions.

Historic Asset Class Analysis

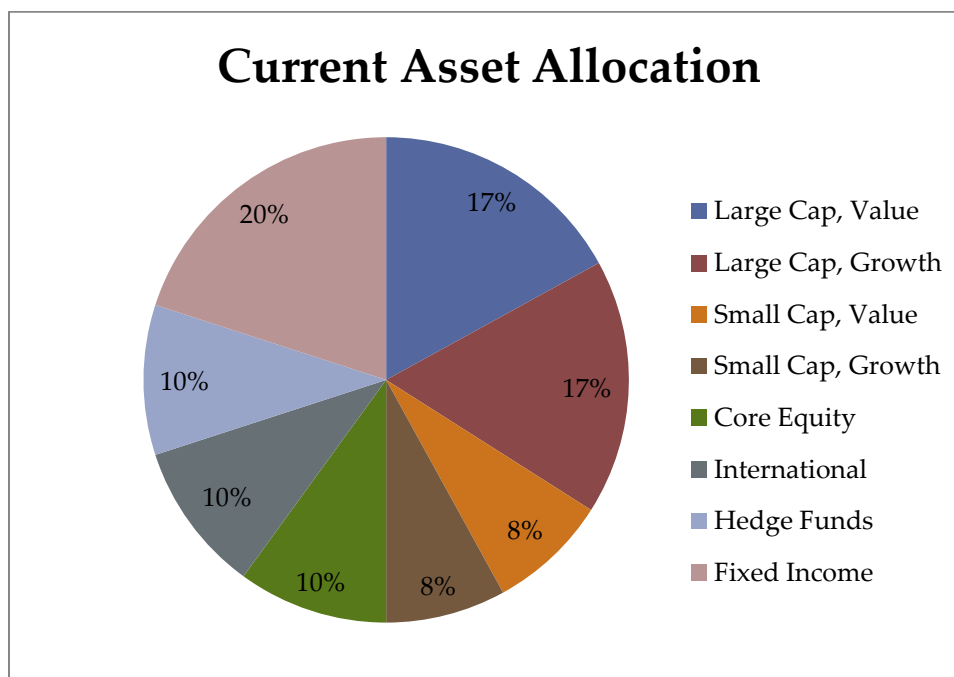
National data were analyzed to determine the performance of each asset class over the past twenty years. Information provided by the Westfield Asset Class Performance and Risk study showed that no one class of assets had consistent superior performance during the period of analysis. In fact, the performance of asset classes varied year by year. The fact that one class of assets performs well for a certain period of time such as two or three years is not necessarily a good indicator that it will perform well for the next two or three years.

Allen Barrow recently confirmed what analyses over the years have shown. He wrote: "The most significant factor in determining long-term investment returns is the diversification of the

asset allocation.” Diversification of assets can also be used to minimize the risk associated with a portfolio.

Current Portfolio Asset Allocation

The current asset allocation for the Foundation’s portfolio is shown in the following chart.



Eight asset classes are included in the current allocation and nine portfolio managers are used. The fixed income allocation is split between two managers.

The current portfolio analysis included industry benchmark data for each asset class and for risk. In addition, benchmark data from foundations of comparable size and with comparable objectives were analyzed for both performance and risk associated with the results. All of the benchmark data and the analysis charts were provided in electronic form to the Foundation and may be obtained from the Foundation office.

The study also analyzed the portion of the portfolio that was in active management versus the portion that was in passive management—specifically index funds. This analysis focused on analyzing returns net of all fees because of the substantial difference in fees charged for active management versus passive management.

Results of Return and Risk Analyses

Asset allocation is the most significant factor in determining the returns of an investment portfolio. Most financial consultants attribute 80 percent or more of the returns to the allocation of the assets. All of the data in this study confirmed this widely accepted investment principle. The Foundation assets have been widely diversified, and the positive results obtained can be attributed to the diversification. The risks in the portfolio were similar to or a slight bit more conservative than the risks taken in benchmark foundations. Most foundations are making some changes in their asset allocations as a result of current and projected economic conditions.

The analysis of active versus passive management and the analysis of the hedge fund asset class need additional explanation.

Active Versus Passive Management

The core equity allocation is currently invested in two index funds. This passive management exceeded the performance of comparable active managers by approximately 50 basis points when the results were analyzed on a net-of-fees basis.

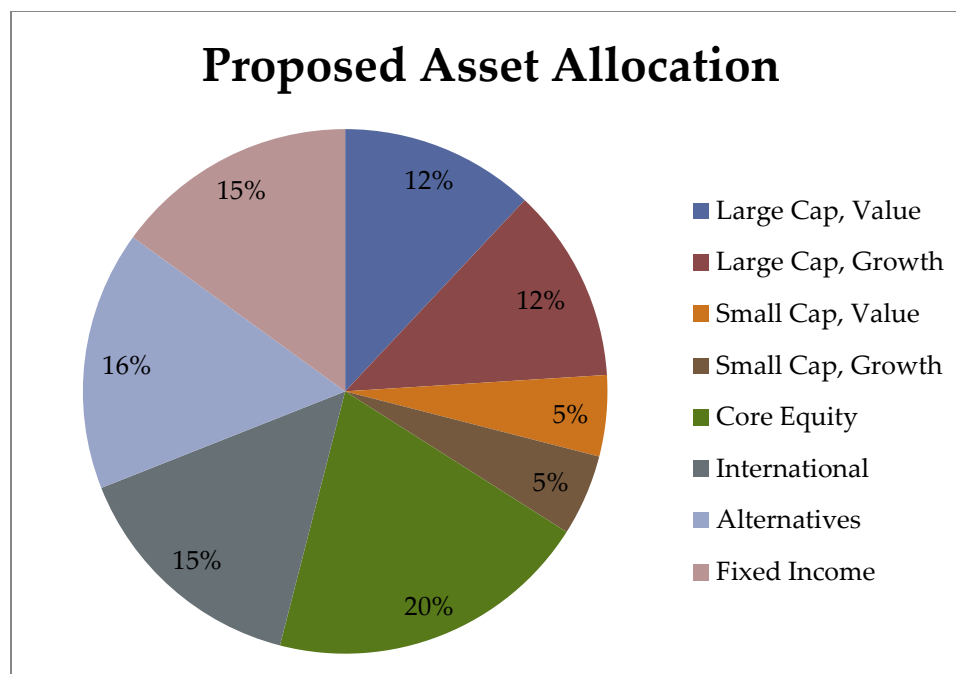
Hedge Fund Asset Class

The risk in the hedge fund asset class was higher than comparable benchmark foundations with the difference being attributed to most benchmark foundations investing in a fund of funds class rather than in one specific hedge fund. Most benchmark foundations broadened the category to alternative investments which included a wider variety of assets such as real estate, timber, private ventures, and other similar asset subclasses in addition to hedge funds.

Conclusions and Recommended Portfolio Restructure

The portfolio performance was comparable to benchmark foundations, and the level of risk was appropriate for the Foundation. In light of current and projected economic conditions, a modification of the asset allocation is recommended.

The proposed asset allocation is shown in the following chart.



Additional Considerations

Consideration should be given to managing the core equity passively to take advantage of the comparable results with lower fees associated with index funds. Consideration should also be given to diversifying the alternative investments to use a fund-of-funds approach for hedge funds and to adding real estate and timber asset subclasses. This diversification would help to minimize the risk of this asset class.

Glenn and Hess Associates

Standards of Attire and Professional Image

Client Expectations – A Professional Image
From Glenn and Hess Associates

Student's Name

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Standards of Attire and Professional Image

A major goal of the Board of Directors of Glenn and Hess Associates is to enhance the professional image of Glenn and Hess Associates. The Board believes that many factors influence professional image including dress standards for employees, appearance of the entire work environment, the appearance of all documents and publications, and the manner in which employees conduct themselves with clients. The Board requested that management begin the process by making recommendations to establish a code of dress for employees. Currently, many employees wear relatively casual attire. Some concern has been expressed about the possibility of casual attire creating an unprofessional image for the agency.

Establishment of Dress Code

The purpose of this report is to benchmark selected companies and to determine the views of clients and employees about appropriate attire for employees. The data will be used to recommend an appropriate dress code for employees of Glenn and Hess Associates.

Sources of Data on Appropriate Attire

Three data sources provided the information used to make judgments about appropriate attire for employees of Glenn and Hess Associates. These sources included the following:

- Observations from 15 benchmark companies.
- Client interviews.
- Discussions with employees.

Data Analyzed by Source

Data from all three sources were analyzed. The approach for acquiring the data from the three sources is described in the following section.

Benchmark Companies

Benchmark companies were selected by senior managers based on three criteria – being a direct competitor, sharing some of the same clients, and reputation in the local area. A study team composed of local MBA students was hired to collect data from benchmark companies. The team did direct observations, interviewed employees, and obtained written policies specifying dress from the companies that had written policies.

In 12 of the 15 benchmark companies, managers and sales staff wore professional attire. Men wore coats and ties, and women wore business suits or tailored dresses. Attire worn by office staff also was professional but a little less formal. The attire of technical people tended to be more casual than that of other employees. In most cases, men wore slacks with shirts that had collars, and women wore slacks or skirts and blouses. In three companies, employees did not dress as professionally as those in the other nine companies did. A few employees wore jeans or jogging outfits.

Six of the companies surveyed observed casual Fridays. However, three of the companies reported that they are planning to eliminate them.

Clients

The clients contacted had strong preferences about professional attire in the office. The following chart summarizes their preferences:

| Client Preferences on Attire | |
|------------------------------|-----|
| Professional | 75% |
| Casual | 15% |
| No preference | 10 |

Most of the clients who were surveyed indicated that they preferred to deal with companies whose employees had a professional appearance. A few clients preferred casual attire or did not have a preference.

Employees

The preferences of employees about professional attire were mixed. The following chart summarizes their preferences:

| Employee Preferences on Attire | |
|--------------------------------|-----|
| Professional | 55% |
| Casual | 35% |
| No preference | 10% |

Recommendations

The proposed dress code for Glenn and Hess Associates divides employees into two categories:

1. Employees who have contact with clients should wear professional attire – coats and ties for men and suits or tailored dresses for women.
2. Employees who do not have contact with clients may dress more casually; slacks and shirts with collars for men and slacks or skirts and blouses for women would be appropriate.

Fridays are acceptable as casual days provided the employee has no contacts scheduled with clients. Jeans, T-shirts, shorts, and jogging outfits are not acceptable at any time. The issue concerning casual Fridays merits additional study.

The attire recommended would enable Glenn and Hess Associates to project a more professional image that is comparable to benchmark companies and that meet the expectations of clients.

Portfolio Structure

Asset Allocation

Student's Name



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Portfolio Structure

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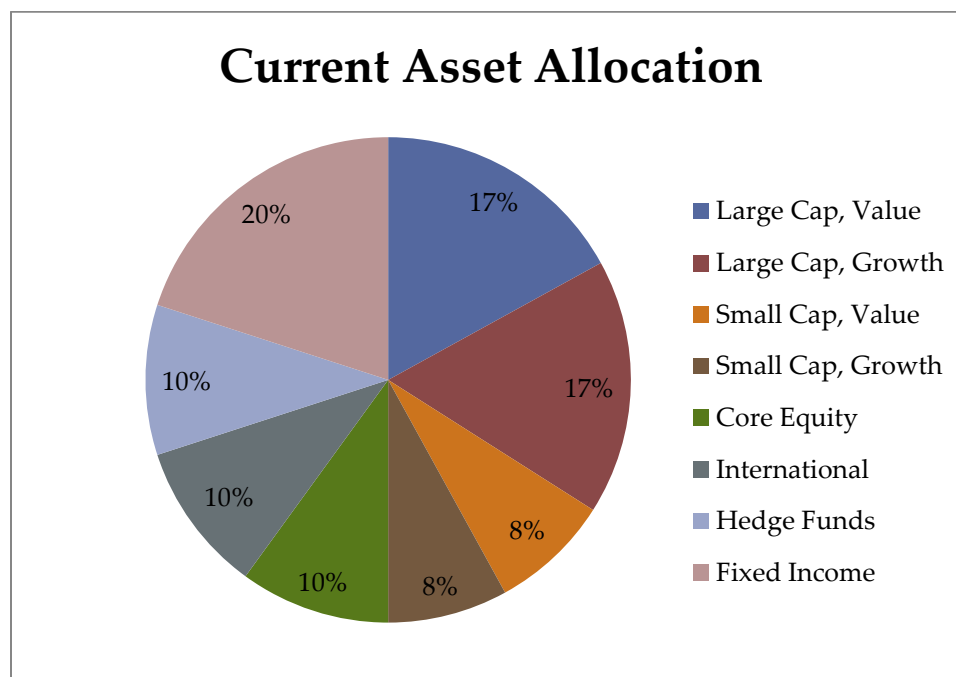
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Active Versus Passive Management

The core equity allocation is currently invested in two index funds. This passive management exceeded the performance of comparable active managers by approximately 50 basis points when the results were analyzed on a net-of-fees basis.

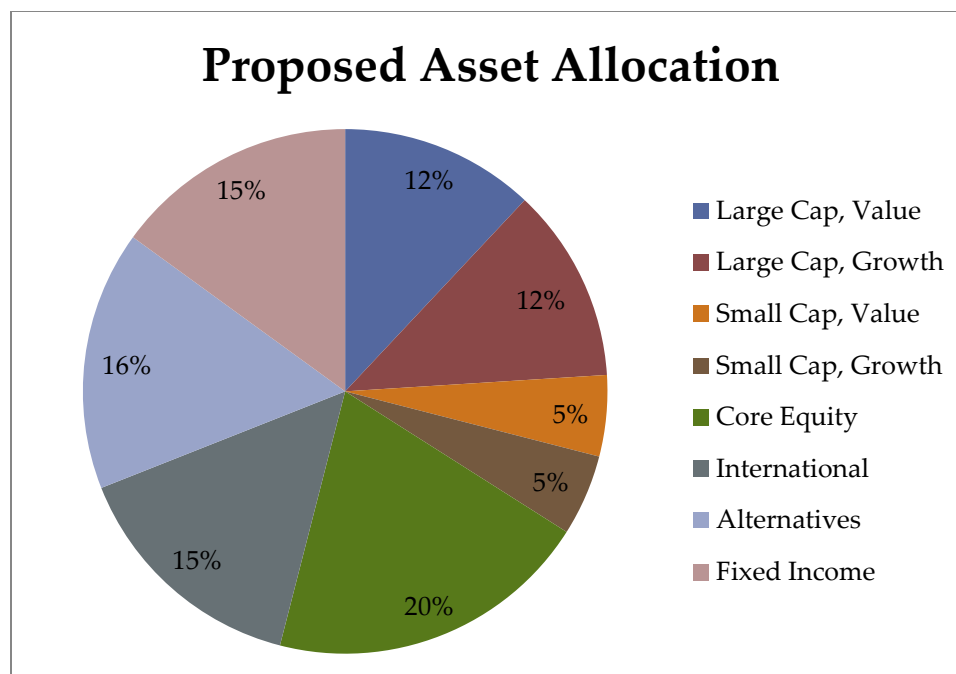
Hedge Fund Asset Class

The risk in the hedge fund asset class was higher than comparable benchmark foundations with the difference being attributed to most benchmark foundations investing in a fund of funds class rather than in one specific hedge fund. Most benchmark foundations broadened the category to alternative investments which included a wider variety of assets such as real estate, timber, private ventures, and other similar asset subclasses in addition to hedge funds.

Conclusions and Recommended Portfolio Restructure

The portfolio performance was comparable to benchmark foundations, and the level of risk was appropriate for the Foundation. In light of current and projected economic conditions, a modification of the asset allocation is recommended.

The proposed asset allocation is shown in the following chart.



Additional Considerations

Consideration should be given to managing the core equity passively to take advantage of the comparable results with lower fees associated with index funds. Consideration should also be given to diversifying the alternative investments to use a fund-of-funds approach for hedge funds and to adding real estate and timber asset subclasses. This diversification would help to minimize the risk of this asset class.

Works Cited

Barrow, Allen. "Impact of Asset Class Diversification on Performance and Risk." Journal of Investment Analysis (2011): 18-22.

Westfield, Phillip. Asset Class Performance and Risk. Austin: Red Rock Publishers, 2011.

Glenn and Hess Associates

Standards of Attire and Professional Image

Client Expectations – A Professional Image
From Glenn and Hess Associates

Student's Name

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Standards of Attire and Professional Image

A major goal of the Board of Directors of Glenn and Hess Associates is to enhance the professional image of Glenn and Hess Associates (Glenn). The Board believes that many factors influence professional image including dress standards for employees, appearance of the entire work environment, the appearance of all documents and publications, and the manner in which employees conduct themselves with clients. The Board requested that management begin the process by making recommendations to establish a code of dress for employees. Currently, many employees wear relatively casual attire. Some concern has been expressed about the possibility of casual attire creating an unprofessional image for the agency.

Establishment of Dress Code

The purpose of this report is to benchmark selected companies and to determine the views of clients and employees about appropriate attire for employees. The data will be used to recommend an appropriate dress code for employees of Glenn and Hess Associates.

Sources of Data on Appropriate Attire

Three data sources provided the information used to make judgments about appropriate attire for employees of Glenn and Hess Associates. These sources included the following:

- Observations from 15 benchmark companies.
- Client interviews.
- Discussions with employees.

Data Analyzed by Source

Data from all three sources were analyzed. The approach for acquiring the data from the three sources is described in the following section.

Benchmark Companies

Benchmark companies were selected by senior managers based on three criteria – being a direct competitor, sharing some of the same clients, and reputation in the local area. A study team composed of local MBA students was hired to collect data from benchmark

companies. The team did direct observations, interviewed employees, and obtained written policies specifying dress from the companies that had written policies.

In 12 of the 15 benchmark companies, managers and sales staff wore professional attire. Men wore coats and ties, and women wore business suits or tailored dresses. Attire worn by office staff also was professional but a little less formal. The attire of technical people tended to be more casual than that of other employees. In most cases, men wore slacks with shirts that had collars, and women wore slacks or skirts and blouses. In three companies, employees did not dress as professionally as those in the other nine companies did. A few employees wore jeans or jogging outfits.

Six of the companies surveyed observed casual Fridays. However, three of the companies reported that they are planning to eliminate them.

Clients

The clients contacted had strong preferences about professional attire in the office (Quick). The following chart summarizes their preferences:

| Client Preferences on Attire | |
|------------------------------|-----|
| Professional | 75% |
| Casual | 15% |
| No preference | 10 |

Most of the clients who were surveyed indicated that they preferred to deal with companies whose employees had a professional appearance. A few clients preferred casual attire or did not have a preference.

Employees

The preferences of employees about professional attire were mixed. The following chart summarizes their preferences:

| Employee Preferences on Attire | |
|--------------------------------|-----|
| Professional | 55% |
| Casual | 35% |
| No preference | 10% |

Recommendations

The proposed dress code for Glenn and Hess Associates divides employees into two categories:

1. Employees who have contact with clients should wear professional attire – coats and ties for men and suits or tailored dresses for women.
2. Employees who do not have contact with clients may dress more casually; slacks and shirts with collars for men and slacks or skirts and blouses for women would be appropriate.

Fridays are acceptable as casual days provided the employee has no contacts scheduled with clients. Jeans, T-shirts, shorts, and jogging outfits are not acceptable at any time. The issue concerning casual Fridays merits additional study.

The attire recommended would enable Glenn and Hess Associates to project a more professional image that is comparable to benchmark companies and that meet the expectations of clients.

Works Cited

Glenn, Patrick. Chairman and CEO Julie Metz. 22 September 2011.

Quick, Jennifer. Client Robert Wheeler. 6 October 2011.

Portfolio Structure

Asset Allocation

Student's Name

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Portfolio Structure

Asset Allocation

The Executive Committee of the Rexmere Foundation requested that Fund Investment Consultants, Inc. prepare a report on the Foundation's portfolio structure. Fund Investment Consultants was also asked to present the report first to the Investment Committee and then to the Board of Directors.

Expected Outcomes

The purpose of the study is to analyze the structure and weighting of the current asset allocation to determine if it is still appropriate in light of changing economic conditions. Both returns and level of risk should be evaluated in light of any recommendations for changes in the asset allocation. The ultimate goal is to recommend an asset allocation that would provide the highest returns with an appropriate level of risk for the Foundation portfolio.

Current Structure Analysis

Two types of data were collected and analyzed—the returns and the risk associated with each asset class historically and the returns and the risk associated with the asset classes in the current portfolio. The results from these analyses were then analyzed in light of current and projected economic conditions.

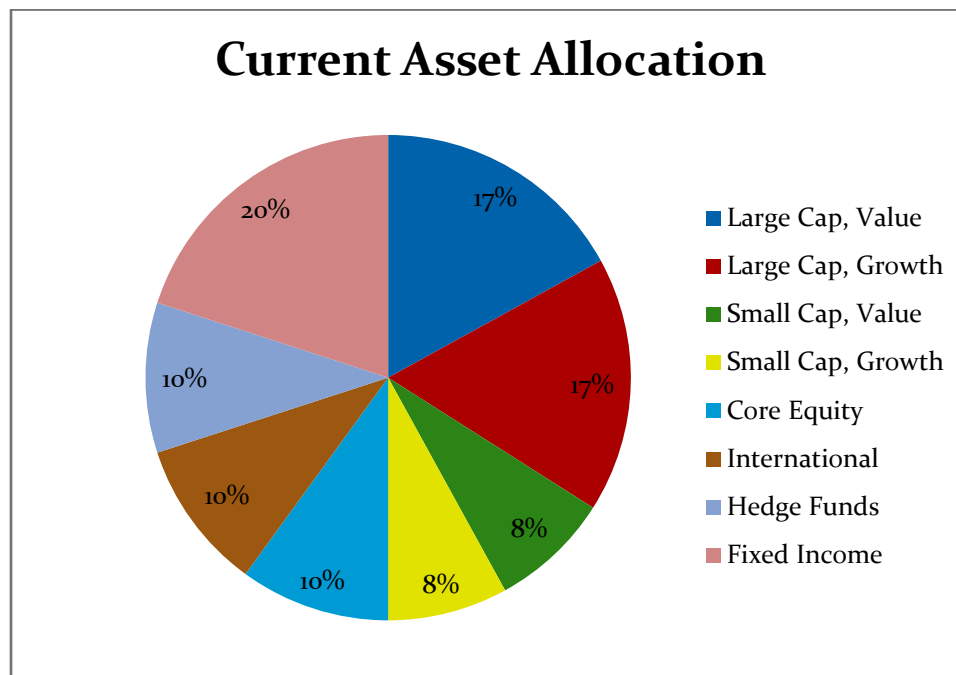
Historic Asset Class Analysis

National data were analyzed to determine the performance of each asset class over the past twenty years. Information provided by the Westfield Asset Class Performance and Risk study showed that no one class of assets had consistent superior performance during the period of analysis (Westfield). In fact, the performance of asset classes varied year by year. The fact that one class of assets performs well for a certain period of time such as two or three years is not necessarily a good indicator that it will perform well for the next two or three years.

Allen Barrow recently confirmed what analyses over the years have shown. He wrote: "The most significant factor in determining long-term investment returns is the diversification of the asset allocation (Barrow)." Diversification of assets can also be used to minimize the risk associated with a portfolio.

Current Portfolio Asset Allocation

The current asset allocation for the Foundation's portfolio is shown in the following chart.



Eight asset classes are included in the current allocation and nine portfolio managers are used. The fixed income allocation is split between two managers.

The current portfolio analysis included industry benchmark data for each asset class and for risk. In addition, benchmark data from foundations of comparable size and with comparable objectives were analyzed for both performance and risk associated with the results. All of the benchmark data and the analysis charts were provided in electronic form to the Foundation and may be obtained from the Foundation office.

The study also analyzed the portion of the portfolio that was in active management versus the portion that was in passive management—specifically index funds. This analysis focused on analyzing returns net of all fees because of the substantial difference in fees charged for active management versus passive management.

Results of Return and Risk Analyses

Asset allocation is the most significant factor in determining the returns of an investment portfolio. Most financial consultants attribute 80 percent or more of the returns to the allocation of the assets. All of the data in this study confirmed this widely accepted investment principle. The Foundation assets have been widely diversified, and the positive results obtained can be attributed to the diversification. The risks in the portfolio were similar to or a slight bit more

conservative than the risks taken in benchmark foundations. Most foundations are making some changes in their asset allocations as a result of current and projected economic conditions.

The analysis of active versus passive management and the analysis of the hedge fund asset class need additional explanation.

Active Versus Passive Management

The core equity allocation is currently invested in two index funds. This passive management exceeded the performance of comparable active managers by approximately 50 basis points when the results were analyzed on a net-of-fees basis.

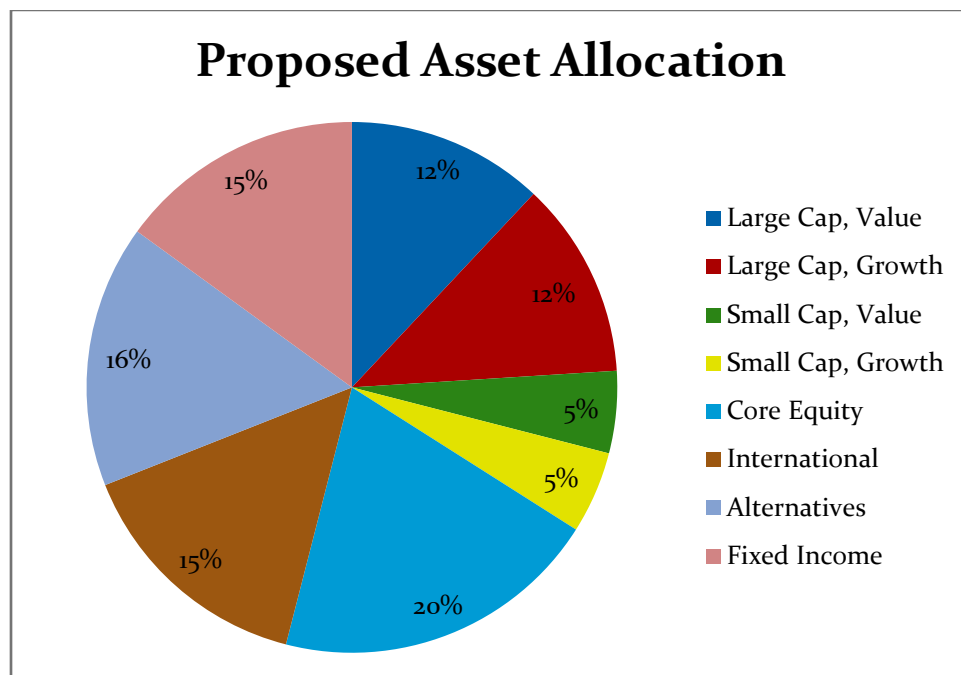
Hedge Fund Asset Class

The risk in the hedge fund asset class was higher than comparable benchmark foundations with the difference being attributed to most benchmark foundations investing in a fund of funds class rather than in one specific hedge fund. Most benchmark foundations broadened the category to alternative investments which included a wider variety of assets such as real estate, timber, private ventures, and other similar asset subclasses in addition to hedge funds.

Conclusions and Recommended Portfolio Restructure

The portfolio performance was comparable to benchmark foundations, and the level of risk was appropriate for the Foundation. In light of current and projected economic conditions, a modification of the asset allocation is recommended.

The proposed asset allocation is shown in the following chart.



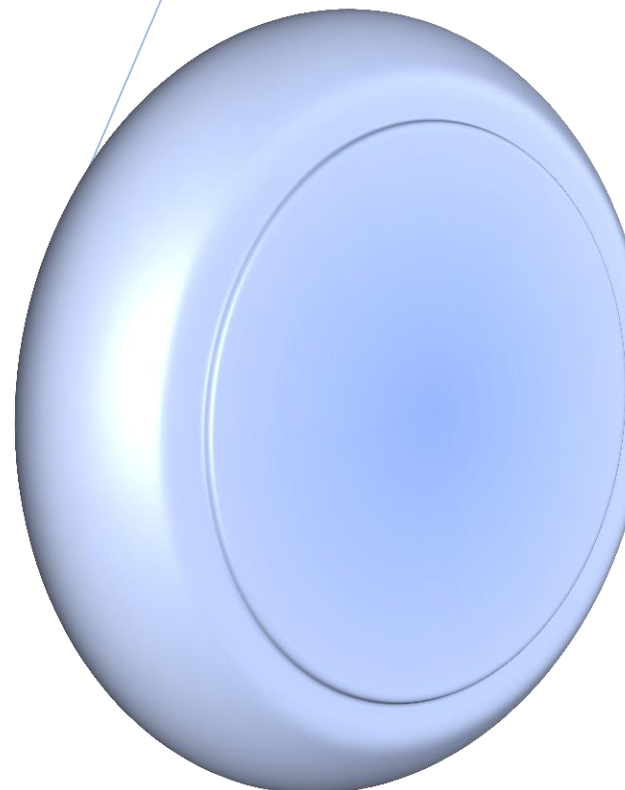
Additional Considerations

Consideration should be given to managing the core equity passively to take advantage of the comparable results with lower fees associated with index funds. Consideration should also be given to diversifying the alternative investments to use a fund-of-funds approach for hedge funds and to adding real estate and timber asset subclasses. This diversification would help to minimize the risk of this asset class.

Works Cited

Barrow, Allen. "Impact of Asset Class Diversification on Performance and Risk." Journal of Investment Analysis (2011): 18-22.

Westfield, Phillip. Asset Class Performance and Risk. Austin: Red Rock Publishers, 2011.



Recreation Complex

Project Status

Student's Name

5/4/20--

Recreation Complex

The Executive Committee authorized a study of the Recreation Complex project that was begun 18 months ago. The study has been completed, and the results are summarized in this report.

Project Status to be Determined

The purpose of this report was to determine the status of the Recreation Complex project and the total cost of the project. The Human Resources Department initiated the project to complement the Conference Center. It is also designed to provide all Reddman employees with a family-friendly environment for evenings and weekends. Employees have requested that a swimming pool be added to the project. The project is located on the 150-acre Reddman Corporation campus near the Conference Center.

Construction and Cost Data Needed

The internal project manager is no longer with Reddman Corporation; therefore, construction data had to be obtained from the supervisor who reported to the project manager and directly from the construction company. Records documenting expenditures were available, but sources of funds to cover the excess expenditures were not identified in the records. The project manager was also responsible for coordinating and overseeing the project budget.

Analysis of Financial and Construction Data

The budget for the construction project was \$640,000. The equipment and furnishings were budgeted at \$60,000. The expected completion time was one year. The following table shows a comparison of the budgeted costs and the actual cost for each segment of the project.

| Recreation Complex Budget and Actual Expenditures | | |
|---|--------------|---------------------|
| Project Segment | Budget | Actual Expenditures |
| Open pavilion | \$ 90,000 | \$134,375 |
| Parking lot | 40,000 | 37,948 |
| Recreation building | 275,000 | 298,492 |
| Playing fields | 150,000 | 165,764 |
| Walking and bicycle trails | 85,000 | 120,000 |
| Total | \$640,000.00 | \$756,579.00 |

The expenditures on the project were \$116,579 more than the project budget. The cost of all project segments exceeded the budget except for the parking lot, which was \$2,052 under budget. Currently the account shows a deficit, and the furnishings and equipment have not yet been purchased. The sources of additional funding have not yet been identified.

The project took approximately eight months longer than expected for completion, and prices escalated significantly during that time period. Change orders on the size of the open pavilion also accounted for significant cost increases. Cost estimates for the swimming pool that managers and employees have requested have not been obtained.

Conclusions on Status and Costs

The Recreation Complex construction has been completed, but the facility is not functional without the furnishings and equipment. Equipment and furnishings have not been purchased. Adding a swimming pool at this time would compound the funding problem. The main issue that must be resolved is finding a source of funds to cover the deficit.

Recommendations for Action

Two options are recommended to solve the funding problem. The first option is to assess a one-time usage fee to each department to cover the costs, since all employees have access to the complex. The second option is to charge the Conference Center's budget for next year. The swimming pool should be deferred until funds to cover costs have been identified. Furnishings and equipment should be purchased immediately. A manager should be designated to oversee the purchase and ensure that the budget is not exceeded.



Student Mentors Association

P.O. Box 1224 | Columbia, SC 29201-1224
803-555-0102 | www.studentmentors.org

Current date

«AddressBlock»

«GreetingLine»

The Student Mentors Association (SMA) has had a significant impact on public education throughout our state. Many young people have remained in the educational system because of the interventions of our statewide network of mentors. However, much remains to be done.

Please accept my sincere thanks for agreeing to serve as «Position» next year. We have an excellent leadership team, and you are a key person on that team. Working together we can make a difference in the lives of many young people.

Our schedule of meetings for the year is enclosed. I look forward to working with you.

Sincerely

Sharon Adams, Chair
Board of Directors

xx

Enclosure



Student Mentors Association

P.O. Box 1224 | Columbia, SC 29201-1224
803-555-0102 | www.studentmentors.org

Current date

Ms. Rae Mays
RaeDeco
426 Trade Street
Greer, SC 29651-3734

Dear Ms. Mays

The Student Mentors Association (SMA) has had a significant impact on public education throughout our state. Many young people have remained in the educational system because of the interventions of our statewide network of mentors. However, much remains to be done.

Please accept my sincere thanks for agreeing to serve as a Board member next year. We have an excellent leadership team, and you are a key person on that team. Working together we can make a difference in the lives of many young people.

Our schedule of meetings for the year is enclosed. I look forward to working with you.

Sincerely

Sharon Adams, Chair
Board of Directors

xx

Enclosure



Student Mentors Association

P.O. Box 1224 | Columbia, SC 29201-1224
803-555-0102 | www.studentmentors.org

Current date

Mr. Jon Lee
Maxxi, Inc.
194 Skyhawk Road
Irmo, SC 29063-7960

Dear Mr. Lee

The Student Mentors Association (SMA) has had a significant impact on public education throughout our state. Many young people have remained in the educational system because of the interventions of our statewide network of mentors. However, much remains to be done.

Please accept my sincere thanks for agreeing to serve as an officer next year. We have an excellent leadership team, and you are a key person on that team. Working together we can make a difference in the lives of many young people.

Our schedule of meetings for the year is enclosed. I look forward to working with you.

Sincerely

Sharon Adams, Chair
Board of Directors

xx

Enclosure



Student Mentors Association

P.O. Box 1224 | Columbia, SC 29201-1224
803-555-0102 | www.studentmentors.org

Current date

Dr. Ann Rast
East & Rast, PA
468 Boykin Avenue
Lamar, SC 29069-8870

Dear Dr. Rast

The Student Mentors Association (SMA) has had a significant impact on public education throughout our state. Many young people have remained in the educational system because of the interventions of our statewide network of mentors. However, much remains to be done.

Please accept my sincere thanks for agreeing to serve as an officer next year. We have an excellent leadership team, and you are a key person on that team. Working together we can make a difference in the lives of many young people.

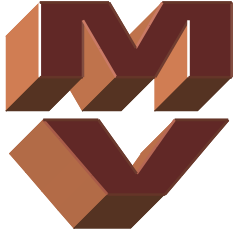
Our schedule of meetings for the year is enclosed. I look forward to working with you.

Sincerely

Sharon Adams, Chair
Board of Directors

xx

Enclosure



MelView Advertising, Inc.

1218 N. Astor Street ♦ Chicago, IL 60610-2315 ♦ 312-555-0197

www.melviewadvertising.com

Current date

Ms. Sonya Hayward
MelView Advertising, Inc.
468 N. Orange Avenue
Orlando, FL 32801-4756

Dear Ms. Hayward

Last year the senior management team began a pilot program of rotating its quarterly planning meeting among the regional offices. The feedback from the regional managers was outstanding, and our senior managers benefited immensely from the input they received. Therefore, we plan to continue the practice.

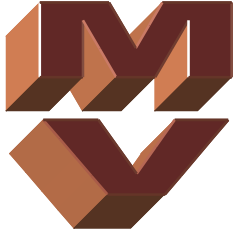
Would you host our March 20 meeting in Orlando? The meeting you hosted last year worked extremely well, and we would like to use the same format.

We look forward to a very productive meeting in your region.

Sincerely

Robert A. Mazingo

xx



MelView Advertising, Inc.

1218 N. Astor Street ♦ Chicago, IL 60610-2315 ♦ 312-555-0197

www.melviewadvertising.com

Current date

Mr. Steve Mulvaney
MelView Advertising, Inc.
207 14th Street NE
Atlanta, GA 30309-3606

Dear Mr. Mulvaney

Last year the senior management team began a pilot program of rotating its quarterly planning meeting among the regional offices. The feedback from the regional managers was outstanding, and our senior managers benefited immensely from the input they received. Therefore, we plan to continue the practice.

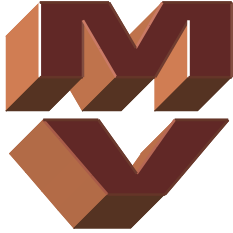
Would you host our July 8 meeting in Atlanta? The meeting you hosted last year worked extremely well, and we would like to use the same format.

We look forward to a very productive meeting in your region.

Sincerely

Robert A. Mazingo

xx



MelView Advertising, Inc.

1218 N. Astor Street ♦ Chicago, IL 60610-2315 ♦ 312-555-0197

www.melviewadvertising.com

Current date

Ms. Robin Crider
MelView Advertising, Inc.
4842 S. Tryon Street
Charlotte, NC 28217-2402

Dear Ms. Crider

Last year the senior management team began a pilot program of rotating its quarterly planning meeting among the regional offices. The feedback from the regional managers was outstanding, and our senior managers benefited immensely from the input they received. Therefore, we plan to continue the practice.

Would you host our October 15 meeting in Charlotte? The meeting you hosted last year worked extremely well, and we would like to use the same format.

We look forward to a very productive meeting in your region.

Sincerely

Robert A. Mazingo

xx



Creative Designs & Production, LLC

Contact Information

Corporate Headquarters

1776 Robin Hood Road
Richmond, VA 23220-1012

Telephone: 804-555-0134

Fax: 804-555-0196

Website: www.cdp-va.net

E-mail: Firstname.Lastname@cdp-va.net

Key Contacts

Owners

Lori Maxwell
Creative Director and Manager
Telephone Extension: 0174
Lori.Maxwell@cdp-va.net

Jeff Maxwell
Producer
Telephone Extension: 0175
Jeff.Maxwell@cdp-va.net

Steve Johnson
Business Manager
Telephone Extension: 0176
Steve.Johnson@cdp-va.net



Creative Designs & Production, LLC

TO: Lori

FROM: Student's Name

DATE: Current date

SUBJECT: CDP Contact Information

The CDP Contact Information that you asked me to design and prepare using our custom theme is attached. Please review it and let me know if you would like to make any changes. Once you have approved it, I will provide all employees with the file so that they can copy it and save it as a Quick Part on their computers.

All of our employees now have Office 2010 installed on their computers. I have spent some time talking with all employees who prepare client documents about the importance of coordinating all documents using the custom theme. Several short training sessions have been scheduled to ensure that our employees can produce publications, worksheets, slide presentations, and documents designed to complement our logo and to promote our corporate identity and branding efforts.

I will give you an update once the training begins. Please let me know if you want to participate in any of the training sessions. Steve has indicated he would like to talk with our employees during the training sessions about changes he is making in our proposals and contracts.

Attachment: CDP Contact Information

F A X

Creative Designs & Production, LLC

1776 Robin Hood Road
Richmond, VA 23220-1012

804-555-0134

www.cdp-va.net



To: [**Click here and type name**]

Fax number: [**Click here and type number**]

From: [**Click here and type name**]

Fax number: [**Click here and type number**]

Date: Current date

Regarding:

[**Click here and type subject**]

Phone number for follow-up:

[**Click here and type number**]

Comments:

F A X**Creative Designs & Production, LLC**

1776 Robin Hood Road
Richmond, VA 23220-1012

804-555-0134

www.cdp-va.net



To: Josh Feldstein
Fax number: 310-555-0146

From: Lori Maxwell
Fax number: 804-555-0196

Date: Current date

Regarding:
School Spirit Project

Phone number for follow-up:
804-555-0174

Comments:

The School Spirit PSA spot for which you directed the filming will be aired on national television next Saturday, (insert date), at the half-time of the Game of the Week on your Channel 28. The game starts at 2:30 p.m. If you receive feedback on the spot, please share it with us.

Lori



Creative Designs & Production, LLC

1776 Robin Hood Road | Richmond, VA 23220-1012 | 804-555-0134 | Fax: 804-555-0196 | www.cdp-va.net

Current date

«AddressBlock»

Dear «Last_Name» «Last_Name»

Public service announcements provide visibility for many of the leading nonprofit organizations that serve our community. Focus groups are a very effective way of making sure that these spots are appropriate and effective.

Thank you for agreeing to represent the «Last_Name» community next year on our community focus group panel. Your input will be extremely valuable to those organizations that serve our community so well.

Information about the way the focus group panel is structured and about the members who will be serving with you on the panel is enclosed. More detailed information will be presented at the orientation meeting.

We look forward to working with you.

Sincerely

Lori Maxwell
Creative Director and Manager

xx

Enclosures



Creative Designs & Production, LLC

1776 Robin Hood Road | Richmond, VA 23220-1012 | 804-555-0134 | Fax: 804-555-0196 | www.cdp-va.net

Current date

Ms. Zoe Davis
3542 Pump Road
Richmond, VA 23233-1115

Dear Ms. Davis

Public service announcements provide visibility for many of the leading nonprofit organizations that serve our community. Focus groups are a very effective way of making sure that these spots are appropriate and effective.

Thank you for agreeing to represent the arts community next year on our community focus group panel. Your input will be extremely valuable to those organizations that serve our community so well.

Information about the way the focus group panel is structured and about the members who will be serving with you on the panel is enclosed. More detailed information will be presented at the orientation meeting.

We look forward to working with you.

Sincerely

Lori Maxwell
Creative Director and Manager

xx

Enclosures



Creative Designs & Production, LLC

1776 Robin Hood Road | Richmond, VA 23220-1012 | 804-555-0134 | Fax: 804-555-0196 | www.cdp.net

Current date

Mr. Max Reed
687 E. Main Street
Richmond, VA 23219-2405

Dear Mr. Reed

Public service announcements provide visibility for many of the leading nonprofit organizations that serve our community. Focus groups are a very effective way of making sure that these spots are appropriate and effective.

Thank you for agreeing to represent the education community next year on our community focus group panel. Your input will be extremely valuable to those organizations that serve our community so well.

Information about the way the focus group panel is structured and about the members who will be serving with you on the panel is enclosed. More detailed information will be presented at the orientation meeting.

We look forward to working with you.

Sincerely

Lori Maxwell
Creative Director and Manager

xx

Enclosures



Creative Designs & Production, LLC

1776 Robin Hood Road | Richmond, VA 23220-1012 | 804-555-0134 | Fax: 804-555-0196 | www.cdp.net

Current date

Dr. Lee Lane
3524 W. Cary Street
Richmond, VA 23221-2729

Dear Dr. Lane

Public service announcements provide visibility for many of the leading nonprofit organizations that serve our community. Focus groups are a very effective way of making sure that these spots are appropriate and effective.

Thank you for agreeing to represent the business community next year on our community focus group panel. Your input will be extremely valuable to those organizations that serve our community so well.

Information about the way the focus group panel is structured and about the members who will be serving with you on the panel is enclosed. More detailed information will be presented at the orientation meeting.

We look forward to working with you.

Sincerely

Lori Maxwell
Creative Director and Manager

xx

Enclosures

School Spirit Project

Project Completed and Delivered

Student's Name

2011

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School Spirit Project

The School Spirit project for Coastal Virginia University has been completed and delivered to the client. This report provides the required project summary with all components including the final budget analysis.

Project Description

The primary deviation from the original plan was the filming of a second spot using the same set, crew, talent, and story line. The role of the actress changed from portraying the younger sister of a student and his friend watching a ballgame to portraying the student's grandmother.¹

Pre-Production Plan

Six days were budgeted for pre-production planning. The first site scouted proved to be an ideal location—from the perspective of size, suitability for filming, furnishings, and cost. An employee of the client made her home and furnishings available for the set at no charge. The client's media relations staff had already prepared the content of the message. All pre-production work was completed in less than four days.

Production

The creative director was enamored with the family pet and requested permission to include him in the spot. The family agreed provided that Andy would cooperate—which he did. A total of 12 hours was allocated for rehearsal filming and actual filming. The first spot was completed in seven hours. The director and producer agreed to film a second spot with a very similar story line. The second spot only required two hours to film.

Actual production costs did not deviate from the budget. Wardrobe, catering, equipment rentals, and all labor costs matched the estimated costs. Travel, per diem, and other expenses appear to be in line with estimates.

¹ Both spots were filmed in less time than was budgeted for the original plan; therefore, the only added cost was for the additional media for filming in high-definition format.

Post-Production Work

In addition to the technical work, the post-production work included reviews by two focus groups prior to the preliminary review by the client. Both reviews were very positive. The post-production work was accomplished in four days.

Budget Analysis

The following budget summary shows the estimated and actual costs for this project. Even though Coastal University of Virginia was given a major discount in our fixed bid, the project was completed significantly under the estimated cost (\$20,565).

| SCHOOL SPIRIT PROJECT BUDGET ANALYSIS | | | | |
|---------------------------------------|-----------------|----------------|-------------|--------------|
| <i>Budget Categories</i> | Estimated Costs | | | Final Costs |
| | Fixed Costs | Variable Costs | Total Costs | Actual Costs |
| <i>Pre-production crew</i> | \$1,500 | \$10,250 | \$11,750 | \$7,390 |
| <i>Location and casting expenses</i> | 2,500 | 5,875 | 8,375 | 3,692 |
| <i>Filming crew</i> | 1,350 | 11,925 | 13,275 | 9,148 |
| <i>Studio and set construction</i> | 0 | 2,500 | 2,500 | 0 |
| <i>Props, wardrobe, animals</i> | 125 | 1,000 | 1,125 | 980 |
| <i>Equipment and rental costs</i> | 2,250 | 7,000 | 9,250 | 6,350 |
| <i>Consumables and miscellaneous</i> | 0 | 1,250 | 1,250 | 1,400 |
| <i>Directors/creative fee</i> | 8,000 | 0 | 8,000 | 8,000 |
| <i>Talent and expenses</i> | 1,000 | 7,000 | 8,000 | 7,500 |
| <i>Production fees</i> | 10,000 | 0 | 10,000 | 10,000 |
| <i>Editorial/finishing</i> | 3,000 | 7,000 | 10,000 | 8,500 |
| <i>Totals</i> | \$29,725 | \$53,800 | \$83,525 | \$62,960 |
| <i>Bid and final costs</i> | | | \$83,525 | \$62,960 |

Potential for Future Business

The client expressed complete satisfaction with the product and considered the second spot that was filmed at no extra cost to be a significant bonus. This gesture was made because rental costs for a studio were not incurred and all phases of the project were completed in less time than budgeted with no sacrifice in quality whatsoever. This project is the third one completed for Coastal Virginia

University, and CDP can expect to contract with them for another project with two spots within the next six months.

Creative Designs & Production Style Guide

Memo Format

Sample document: *p1-j1*

Template: *cdp memo* (save heading as Quick Part)

Letter Format

Sample document: *p1-j2*

Template: *cdp letterhead*

Two-Page Letter Format

Sample document: *p1-j4*

Schedule Table

Sample document: *p1-j3*

Fax

Sample document: *p2-j3*

Template: *cdp fax*

Contact Information

Sample document: *p2-j1* (save entire page as a Quick Part)

Project Report with Budget Analysis Table

Sample document: *p2-j5*