

# **Writing with Impact for Effective Communication**



Georgia Leadership Institute  
for School Improvement

**A Performance-based Learning Module  
for Georgia's Educational Leaders**

# Related Modules

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## Related GLISI Modules

Other modules related to this topic include:

- *Giving Effective Performance Feedback*
  - *Leading a Team to Analyze and Display Data Using Quality Tools*
  - *Leading a Team to Develop Effective Verbal Skills*
  - *Leading a Team to Develop Project Management Tools*
  - *Leading Tactical Meetings*
  - *Leading Team Discussions*
-

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## Performance Objective(s)

Given This...	Do This...	To Meet These Criteria...
<ul style="list-style-type: none"><li>• A minimum of eight hours (in one session, or divided into several sessions)</li><li>• Working on your own</li><li>• A list of organizational approaches (strategies)</li><li>• Editing checklist (See Appendix B for an example)</li><li>• Computer, printer, and word processing software</li></ul>	<p>Analyze, draft, and finalize effective written communications to both an internal and external reader, specifically:</p> <ul style="list-style-type: none"><li>• An internal memo</li><li>• A business letter</li></ul>	<ul style="list-style-type: none"><li>• The detailed task performance criteria listed in the Performance Checklists in the Topic Practice(s), Final Practice, and Final Assessment</li><li>• GLISI's criteria for how to work effectively as a team leader/facilitator, listed in the Performance Feedback Form(s) located in the Final Practice and Final Assessment</li></ul>

# Module Introduction

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**Writing with Impact** Communication skills enable you to lead others. Written expression is a skill area that most educators would agree is crucial to job success, but many adult writers struggle to organize and create clear, concise, documents. Effective communication skills form the foundation for successful school management. These skills are so basic that often we overlook their significance or assume we are skillful.

As community and instructional leaders, principals have the opportunity to model and teach the power of the written word. This module focuses on ways to help you fine tune and master this essential craft.

By the end of this module you will be able to analyze, draft, and finalize effective written communications concerning a school situation in the form of an internal memo and a business letter.

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## What Is the Leader's Role?

- Be prepared with the necessary materials and supplies
  - Schedule and communicate meeting times and locations to participants
  - Thank the participants, acknowledging everyone's worthwhile contribution to the group and commitment to future actions
- 

## Begin With The End in Mind

Research about effective assessment of performance tells us that the learner always performs better when they understand what they should know and be able to do. For this reason, you are encouraged to **review the Final Assessment in its entirety** in order to:

- Understand the knowledge, skills, and behaviors that are being taught and tested in this module
  - Understand the standards (performance criteria) by which your performance will be assessed
  - Gauge your current level of performance against what will be expected of you by the end of the module
  - Prioritize which areas to concentrate on as you work through the module
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# Topic 1: Writing Memos that Matter

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## Writing Memos that Matter

School leaders communicate in writing most often to internal readers, such as staff and central office personnel. Therefore, memos and letters are the most used forms of written communication and can often make the difference in your career path.

Communication by memorandum saves valuable time. The effective administrator knows when and how to use this communication tool to reach other people and expedite the flow of information among members of the school community.

In this topic you will:

- Analyze your audience and purpose for a memo
- Draft and finalize a memo

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## Quick Call to Action

“Memos are compact communications intended to trigger action” (Yerkes & Morgan, 1991). Be sure the reader understands what you want and when you want it. As the memo writer, you may need to give information concerning new policies and staff decisions, relay information, present facts for decisions made by others, report progress on school projects, suggest ideas, justify or set responsibility for certain courses of action, or take a stand on an issue. Memos are useful in making sure that information communicated verbally is not forgotten or misunderstood.

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## Key Components

The most important part of the memo is the body. Memos emphasize the important facts, avoiding needless and trivial details. Get to the point quickly by using short words, sentences, paragraphs, and lists to keep the reader's interest.

Effective memos include at least three parts:

1. Introduction: State the purpose of the memo and the method used to obtain information presented.
2. Body: Assert the message objectively, and include sufficient detailed information. Avoid mixing opinion with facts in this part of the memo.
3. Conclusion: Summarize the facts, and outline a plan of action or make recommendations for future action. "Personal comments and opinions may be included in this section; however, conclusions must be supported by facts or other evidence presented in the memo" (Hennington, p. 86).

Presented below are the major features found in well written memos:

Feature	Notes
MEMORANDUM Head	The word Memorandum is typed at the top of the page
TO Line:	
FROM Line:	
Writer's Initials	Writer's initials are inserted by your typed name on the FROM line
DATE Line	
RE: Subject or Action Requested Line	Provides a useful way to file and retrieve correspondence
BODY	
Reference Initials	Reflects the initials of the secretary or person who prepared memo
ENC., ENCL., ENC.1 Enclosure notation	Used if you include additional items with your memo
Cc: Carbon Copy Notation	

## Analyze Your Audience

Before putting pen to paper or turning on the computer, be sure to ask yourself the two most important questions about any piece of correspondence:

- Who is my audience?
- What is my purpose in writing to this audience?
  - What do you want to happen?
  - What do you want your reader to do or say, think, or perform?
  - What do I know about this audience that should influence any aspect of my writing?

It is important to take into consideration everything you already know about your audience and about your relationship to that audience before you begin to address the situation. When writing to many members of the staff, such knowledge and insight may come automatically to you because of your history with them. For others, you may need to think more consciously and carefully to identify the characteristics you need to consider. Here are some questions to ask yourself:

- Have I established a history with this audience?
  - Have my previous experiences with this audience been positive, negative, or neutral?
  - Does this audience have any personal needs, interests, experiences, personal situations about which I should be aware and which should influence my approach to the situation?
-

**Consider Your  
Tone**

Whatever the case, the important thing is to be certain you have identified your audience and that you have determined what you need to know to address that audience effectively.

Pawlas and Meyers (1989) give us a framework to consider in judging our tone.

<b>Tone</b>	<b>Description</b>
Authoritative	Threatening and cast in stone
Collaborative	Shows respect for the expertise of others and encourages shared decision-making
Complimentary	Gives a colleague a pat on the back
Supportive	Combines constructive criticism with an offer of help
Informal/Friendly	Acknowledges ongoing professional respect and rapport
Objective	Reports the facts directly and candidly

## Clarify Your Purpose

Why am I writing to this audience? Addressing this question implies two considerations:

1. Could your purpose be accomplished in some manner other than through writing?
2. Could you walk down the hall and deliver the message verbally? Would that be a better way of conveying the message? Is it really necessary to write?

Once you have determined that a written message is the proper mode of communication for this particular message, what do you hope to accomplish through this correspondence? Do you expect the audience to do something as a result? Do you simply want the audience to know something? What are the expectations that have caused you to write?

The failure to answer these vital questions probably lies at the heart of most failed correspondence. When people don't ask these questions, they usually flounder and write aimlessly, often writing around and around the actual subject without ever coming to grips with it because they have not properly identified the subject for themselves.

By answering these questions writers provide the kind of focus and direction which allows them to write clearly, succinctly, and effectively. They know where they want to go and what they want to accomplish. Having identified these two goals, their writing often flows effortlessly and accomplishes what they expect.

If you are not already in the habit of very consciously identifying your **audience** and **purpose** before you begin writing, you might find it very helpful to start writing the two words right at the top of your memo pad or typing them right at the top of your computer screen before you begin every piece of writing for a while. Make it part of your writing routine. Then make sure you identify both characteristics as clearly as possible. You will soon find that doing so will make your writing flow more smoothly.

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**Organizational Approaches**

Effective memo writers choose an organizational strategy that best suits their purpose. No rigid rules govern the content and organization of memos. Here are the most frequently used organizational tactics found in businesslike writing.

Approach	Action
Analytical	State situation, your analysis and conclusions.
Chronological	List the activities by order of time or sequence.
Deductive	Start with a summary of conclusions or recommendations; then support with facts and findings.
Inductive	Open with facts and findings; then present conclusions and or recommendations. This approach is often used in giving bad news.
Need/ Plan/Benefit	Begin with a description of the current need in your situation, outline a plan to meet the need, and then state the benefits.
Problem/Solution	Disclose the dilemma; then offer your solution.
Topic	Identify the key points and then develop each one. The order of topics is by preference.
Question/Answer	Raise the issue by asking a question and then answering it.

**What Resources are Required?**

- A list of organizational approaches (strategies)
- Editing checklist (See Appendix B for an example)
- Computer, printer, and word processing software

**Tip(s)**

Remember these three writing principles offered by Joyce Wycoff (1991):

1. First and foremost: No one wants to read it!
2. Second and important: Almost no one will read all of it!
3. Third and critical: Almost everyone will misunderstand some part of it (p.69).

Therefore:

- Keep sentences and paragraphs short
- Write like you speak to make your writing more readable
- Plan your written documents before beginning to write
- Consider your audience and its needs
- Edit and proofread all your correspondence for common errors
- Use a variety of sentence openers and sentence structures
- Eliminate the use of jargon
- Use a variety of vocabulary words that the audience understands
- Use charts, tables, and graphics to reinforce your message
- Allocate time for writing
- Seek feedback on your writing

The sample memo in Appendix A demonstrates the key features suggested on this topic. The writer has outlined the approach to this writing task in the shaded section and we have provided an analysis of the features in the column marked *Document Analysis*.

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**How Do I Do It?**

- Read through the steps in the step-action table (see next page)
  - Study any accompanying examples
  - Complete the practice exercise
  - Share the results with your Performance Coach
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**Step-Action Table**

Step	Action
1. <b>Analyze the issues</b>	Pinpoint the key issue you are addressing with this audience. Clearly frame the problem.
2. <b>Consider your audience and tone</b>	Assess the anticipated attitude of the reader(s): neutral, positive, or negative. Identify the information this audience needs and is willing to accept. Determine the tone you need to convey in order to make this an effective communication piece.
3. <b>Identify your purpose</b>	Complete these cues: <ul style="list-style-type: none"> <li>• I want (WHO) to do (WHAT) because (REASON).</li> <li>• I expect to inform, describe, persuade, command, or show appreciation. (choose one)</li> </ul>
4. <b>Select an organizational approach</b>	Choose an appropriate organizational strategy to shape the message. Review the key components for the strategy selected.
5. <b>Draft the memo</b>	Develop a working draft. Check for educational jargon. If you find it, make sure you clarify what the terms means. Check for unnecessary details.
6. <b>Edit your draft</b>	Use an editing checklist to review your draft. (See sample editing checklist in Appendix B)
7. <b>Ask for a peer review</b>	Ask a colleague to review your draft and give you improvement feedback as needed.
8. <b>Finalize the memo</b>	Complete revisions to the memo based on feedback from the peer review.

## Practice Exercise

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### Instructions

- Follow the steps in the Step-Action Table for this topic
  - Complete the Practice Worksheet and/or forms, listing results that are realistic based on the information in the practice scenario below
  - Check your work
  - Meet with your Performance Coach to review the results and decide what to do next
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### Practice Scenario

Part 1: Examine the Staff Inservice memo on the following page, and answer the questions in the right column. Then compare your findings to the revised version of the memo in Appendix C.

Part 2: Write a memo on a topic of your choosing according to the steps in the topic Step-Action Table, completing the Practice Worksheet as you go.

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<p style="text-align: center;"><b>MEMORANDUM</b></p> <p>October 15, 2007</p> <p>TO: All Staff Members</p> <p>FR: Martha Murphy</p> <p>RE: Staff Inservice</p> <p>Our school system is facing rapidly changing student and community demographics. Quite often teachers are not kept informed of these changes and the possible consequences for teaching and learning in their classrooms. Many teachers have expressed concerns about the rising rate of school misbehavior, suspensions, and school-related violence.</p> <p>The staff development department wants to bridge this communication gap by updating teachers on the changing student and community demographics in our school system and the implications for teachers.</p> <p>The logical step is a workshop that addresses these issues. Dr. Discipline, a noted teacher educator, will present his views on classroom management as it relates to changing school populations on Friday, November 10, from 4 until 6 p.m. at the Staff Development Center.</p> <p>We would hope that after attending this workshop you could return to your classroom with a better understanding of your students' needs and several alternative approaches in managing students' behavior.</p> <p>This in-service will be beneficial to all teachers. We all have the same goal of reaching and teaching all students. We hope the exchange of ideas will foster this objective. We look forward to seeing you on November 10.</p>	<p>Underline the reason or purpose of this memo. Is there more than one?</p> <p>Draw a line to the part of the memo that answers the Five W's.</p> <p><b>WHO</b></p> <p><b>WHAT</b></p> <p><b>WHEN</b></p> <p><b>WHERE</b></p> <p><b>WHY</b></p> <p>How clear is the message?</p> <p>What organizational strategy is evident?</p> <p>Check sentence length.</p> <p>Check paragraph organization</p> <p>What features of a memo are not included?</p>
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### Practice Worksheet

Identify your purpose.

- I want (WHO) \_\_\_\_\_ to do (WHAT) \_\_\_\_\_  
because (REASON) \_\_\_\_\_.
- I expect to inform, describe, persuade, command, or show appreciation. (choose one)

Choose the best organizational strategy to shape your message.

- |  |   |  |
|--|---|--|
| <input type="checkbox"/> Analytical    | <input type="checkbox"/> Inductive          | <input type="checkbox"/> Topic           |
| <input type="checkbox"/> Chronological | <input type="checkbox"/> Need/ Plan/Benefit | <input type="checkbox"/> Question/Answer |
| <input type="checkbox"/> Deductive     | <input type="checkbox"/> Problem/Solution   | <input type="checkbox"/> Other: _____    |

Use a word processing program, such as Word, to draft the memo based on the information you have identified so far. Check for educational jargon and unnecessary details, and edit the memo according to the editing checklist. (See sample editing checklist in Appendix B) Attach a copy of the draft.

Summarize the feedback provided from the peer review of your memo.

Attach a copy of your finalized memo.

**Topic Practice Performance Checklist**

Select one:  Performer's self-assessment  Performance Coach's observations

Performer's Name: \_\_\_\_\_

Performance Coach's Name: \_\_\_\_\_

Date of Performance: \_\_\_\_\_

*Check off each criterion that is observed. If the performance meets criteria with satisfactory quality, mark Yes. If not, mark No and provide feedback (use the back of the page for more space). Enter this performance into your portfolio when **all** items are marked Yes.*

Evidence	Criteria	Proficient? Give Feedback.
1. The Staff Inservice memo was examined	<input type="checkbox"/> The questions in the right column have been answered	<input type="checkbox"/> Yes <input type="checkbox"/> No
2. The issues were analyzed	<input type="checkbox"/> The key issues are listed	<input type="checkbox"/> Yes <input type="checkbox"/> No
3. Audience attitude and required tone have been considered	The following information is present: <input type="checkbox"/> The anticipated attitude of the reader <input type="checkbox"/> The information this audience <u>needs</u> to accept <input type="checkbox"/> The information this audience <u>is willing</u> to accept <input type="checkbox"/> The tone needed for making this an effective communication piece	<input type="checkbox"/> Yes <input type="checkbox"/> No
4. The purpose has been defined	<input type="checkbox"/> Who, what, and reason are present <input type="checkbox"/> One of the following has been selected: inform, describe, persuade, command, or show appreciation	<input type="checkbox"/> Yes <input type="checkbox"/> No

Evidence	Criteria	Proficient? Give Feedback.
5. An organizational approach has been selected	<input type="checkbox"/> An organizational strategy for shaping the message has been selected	<input type="checkbox"/> Yes <input type="checkbox"/> No
6. The memo was drafted	<input type="checkbox"/> A copy of the draft is present <input type="checkbox"/> Educational jargon, if present, is clarified <input type="checkbox"/> No unnecessary details are present	<input type="checkbox"/> Yes <input type="checkbox"/> No
7. Editing and peer review have been completed	<input type="checkbox"/> A summary of the peer review feedback is present	<input type="checkbox"/> Yes <input type="checkbox"/> No
8. The memo has been finalized	<input type="checkbox"/> A copy of the final memo is present	<input type="checkbox"/> Yes <input type="checkbox"/> No

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## Topic 2: Writing Letters that Mean Business

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### Writing Letters that Mean Business

In today's world, school leaders who can prove they are results-oriented and show instructional gains to their stakeholders are supported. Principals who can handle correspondence in a timely manner and know how to say the right thing to a targeted audience build credibility and trust. In contrast, not knowing how to say the right thing, or writing fear, immobilizes the reluctant writer. Procrastination sets in, often resulting in little or no communication. Lack of communication, as well as poor communication, may be the difference between career advancement or working elsewhere.

In this topic you will:

- Analyze your audience and purpose for a business letter
- Draft and finalize a business letter

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### Know What You Want

According to Malcolm Forbes (1981), a good business letter can get you money, help, or “get you off the hook.” He offers these suggestions to get the job done:

- Answer promptly.
- Write your purpose in one sentence.
- List the major points before you write. Answer the five W's (Who, What, Where, When, and Why), or develop a mindmap to help organize ideas.
- If responding to a letter, check the points that need attention. Keep it in front of you to avoid omitting a pertinent issue or concern.
- Call the reader by name, not “Dear Sir, Madame, or Ms.”
- State the purpose in the first paragraph.
- Write the letter from the reader's point of view. Tell what's in it for him or her. Anticipate questions and objections.

*Continued next page*

- Create a positive impression even if you are delivering bad news—A real PR challenge!
  - Write the way you speak. How many times have you started a conversation with, “Thank you for your letter dated...?”
  - Be specific, clear, and concise. Keep your letter to one page.
  - “Lean heavier on nouns and verbs, lighter on adjectives. Use the active voice instead of passive” (Forbes, p.80).
- 

### **Check for Vital Body Parts**

Check for the following vital parts in your business letters:

- **Inside Address:** Include a correct and complete inside address.
- **Date:** For both reference and legal reasons, all correspondence should be dated. Two forms are acceptable: February 4, 2005, or 4 February 2005
- **Subject Line or Filing Reference:** A subject or reference line keeps you and the reader focused on the purpose of the letter. It also provides a handy cross-reference tool for filing all correspondence.
- **Salutation:** Select a greeting that reflects the formality of the message and the relationship you have to the reader. Examples: Hi Joan, Dear Joan, Dear Joan:, Dear Ms. Wilder:, Dear Joan Wilder.
- **Message:** Like a memo, the body of your letter should be clearly organized into three parts:
  - **Introduction:** State the purpose of the letter and the method used to obtain information presented.
  - **Body:** Assert the message objectively and include sufficient detailed information. Avoid mixing opinion with facts in this part of the letter.
  - **Conclusion:** Summarize the facts, and outline a plan of action or make recommendations for future action. Support conclusions and recommendations with facts presented in the letter

*Continued next page*

- **Organizational Approach:** Business letters require clear reasoning and an orderly presentation of facts and ideas. Use the organizational strategies presented in Topic 1 (see p. 24) to select the best way to structure your message.
  - **Closing and Signature:** Try to match the sign-off to the purpose and tone of the letter. Obviously, a letter of reprimand signed “Warmly,” could be grounds for harassment. Suggestions: All the best, Best regards, Cordially, Cordially yours, Regards, Regretfully, Respectfully, Sincerely, Sincerely yours, Thank you, Very best regards, Very truly yours, Warmly, With sincere regrets, Yours truly.
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### **Sample Letter**

The sample business letter in Appendix D demonstrates the key features in a well written business letter. In the shaded section, the writer has outlined the approach to this writing task. In the right column is a document analysis linking the contents to the key components of a business letter.

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### **What Resources are Required?**

- A list of organizational approaches (strategies)
  - Editing checklist (See Appendix B for an example)
  - Computer, printer, and word processing software
- 

### **How Do I Do It?**

- Read through the steps in the step-action table (see next page)
  - Study any accompanying examples
  - Complete the practice exercise
  - Share the results with your Performance Coach
-

**Step-Action Table**

Step	Action
1. <b>Analyze the issues</b>	Pinpoint the key issue you are addressing with this audience. Clearly frame the problem.
2. <b>Consider your audience and tone</b>	Assess the anticipated attitude of the reader(s): neutral, positive, or negative. Identify the information this audience needs and is willing to accept. Determine the tone you need to convey in order to make this an effective communication piece.
3. <b>Identify your purpose</b>	Complete these cues: <ul style="list-style-type: none"> <li>• I want (WHO) to do (WHAT) because (REASON).</li> <li>• I expect to inform, describe, persuade, command, or show appreciation. (choose one)</li> </ul>
4. <b>Select an organizational approach</b>	Choose an appropriate organizational strategy to shape the message. Review the key components for the strategy selected.
5. <b>Draft the letter</b>	Develop a working draft. Check for educational jargon. If you find it, make sure you clarify what the terms means. Check for unnecessary details.
6. <b>Edit your draft</b>	Use an editing checklist to review your draft. (See sample editing checklist in Appendix B)
7. <b>Ask for a peer review</b>	Ask a colleague to review your draft and give you improvement feedback as needed.
8. <b>Finalize the letter</b>	Complete revisions to the letter based on feedback from the peer review.

## Practice Exercise

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### Instructions

- Follow the steps in the Step-Action Table for this topic
  - Complete the Practice Worksheet and/or forms, listing results that are realistic based on the information in the practice scenario below
  - Check your work
  - Meet with your Performance Coach to review the results and decide what to do next
- 

### Practice Scenario

Part 1: Examine the business letter on the following page, and answer the questions in the right column. Then compare your findings to the revised version of the memo in Appendix E.

Part 2: Write a business letter on a topic of your choosing according to the steps in the topic Step-Action Table, completing the Practice Worksheet as you go.

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	Document Analysis
<p>January 26, 2007</p> <p>Mr. Pete Smith                      Wallington Fencing Company                      PO Box 100                      Detroit, MI 30032</p> <p>Dear Mr. Smith:</p> <p>On Wednesday, January 12, 1996, it was noted by a staff member that the new fence around the primary recreational area was in need of repair. I contacted you by phone on January 13 and then again on January 20, regarding this matter.</p> <p>You stated in our phone conversation that you would send a crew to repair the fence within one week. As discussed in our telephone conversation of January 13, it is our opinion that the fence should be repaired as soon as possible. As I explained to you, the two support posts were pulled out of the ground and the children in the primary grades could gain access to a very busy thoroughfare should they pull or push it over.</p> <p>We hope you will fix this fence as soon as possible. It is a potential hazard to young children and should be fixed immediately.</p> <p>Cordially,</p> <p><i>Jane Alexander</i></p> <p>Principal</p>	<p>Underline the purpose of the letter. Then write an opening sentence that expresses this purpose.</p> <p>Can you think of a way to strengthen the writer's efforts to get action on this request?</p> <p>Has this principal covered all the bases?</p> <p>What legal problems could follow?</p> <p>What else would you change?</p>

## Practice Worksheet

To prepare for writing the business letter, first analyze the issues.

What are the key issues you are addressing with this audience?

Next, analyze your audience and tone.

- What is the anticipated attitude of the reader: neutral, positive, negative?
  
- What information does this audience need to accept?
  
  
- What information do you think they are willing to accept?
  
  
- What tone do you need to convey in order to make this an effective communication piece?
  - Authoritative
  - Collaborative
  - Complimentary
  - Supportive
  - Informal/Friendly
  - Objective
  - Other: \_\_\_\_\_

### Practice Worksheet

Identify your purpose.

- I want (WHO) \_\_\_\_\_ to do (WHAT) \_\_\_\_\_  
because (REASON) \_\_\_\_\_.
- I expect to inform, describe, persuade, command, or show appreciation. (choose one)

Choose the best organizational strategy to shape your message.

- |  |   |  |
|--|---|--|
| <input type="checkbox"/> Analytical    | <input type="checkbox"/> Inductive          | <input type="checkbox"/> Topic           |
| <input type="checkbox"/> Chronological | <input type="checkbox"/> Need/ Plan/Benefit | <input type="checkbox"/> Question/Answer |
| <input type="checkbox"/> Deductive     | <input type="checkbox"/> Problem/Solution   | <input type="checkbox"/> Other: _____    |

Use a word processing program, such as Word, to draft the letter based on the information you have identified so far. Check for educational jargon and unnecessary details, and edit the letter according to the editing checklist. (See sample editing checklist in Appendix B) Attach a copy of the draft.

Summarize the feedback provided from the peer review of your letter.

Attach a copy of your finalized letter.

**Topic Practice Performance Checklist**

Select one:  Performer's self-assessment  Performance Coach's observations

Performer's Name: \_\_\_\_\_

Performance Coach's Name: \_\_\_\_\_

Date of Performance: \_\_\_\_\_

*Check off each criterion that is observed. If the performance meets criteria with satisfactory quality, mark Yes. If not, mark No and provide feedback (use the back of the page for more space). Enter this performance into your portfolio when **all** items are marked Yes.*

Evidence	Criteria	Proficient? Give Feedback.
1. The business letter was examined	<input type="checkbox"/> The questions in the right column have been answered	<input type="checkbox"/> Yes <input type="checkbox"/> No
2. The issues were analyzed	<input type="checkbox"/> The key issues are listed	<input type="checkbox"/> Yes <input type="checkbox"/> No
3. Audience attitude and required tone have been considered	The following information is present: <input type="checkbox"/> The anticipated attitude of the reader <input type="checkbox"/> The information this audience <u>needs</u> to accept <input type="checkbox"/> The information this audience <u>is willing</u> to accept <input type="checkbox"/> The tone needed for making this an effective communication piece	<input type="checkbox"/> Yes <input type="checkbox"/> No
4. The purpose has been defined	<input type="checkbox"/> Who, what, and reason are present <input type="checkbox"/> One of the following has been selected: inform, describe, persuade, command, or show appreciation	<input type="checkbox"/> Yes <input type="checkbox"/> No

Topic 2: Writing Letters that Mean Business  
Writing with Impact for Effective Communication

Evidence	Criteria	Proficient? Give Feedback.
5. An organizational approach has been selected	<input type="checkbox"/> An organizational strategy for shaping the message has been selected	<input type="checkbox"/> Yes <input type="checkbox"/> No
6. The letter was drafted	<input type="checkbox"/> A copy of the draft is present <input type="checkbox"/> Educational jargon, if present, is clarified <input type="checkbox"/> No unnecessary details are present	<input type="checkbox"/> Yes <input type="checkbox"/> No
7. Editing and peer review have been completed	<input type="checkbox"/> A summary of the peer review feedback is present	<input type="checkbox"/> Yes <input type="checkbox"/> No
8. The letter has been finalized	<input type="checkbox"/> A copy of the final letter is present	<input type="checkbox"/> Yes <input type="checkbox"/> No

# Final Practice

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## Instructions

- Perform this practice, referring to the topic step-action tables as needed.
  - Complete the Final Practice Worksheet, listing results that are realistic based on the information in the practice scenario.
  - Check your work.
  - Meet with your Performance Coach to review the results and decide what to do next.
  - Completing this Final Practice requires meetings with a team of 2 - 4 peers. Prepare for these meetings by:
    - Communicating the time and location of the meeting to the participants in advance
    - Preparing and providing copies of a meeting agenda
    - Being prepared with all the necessary materials and resources
-

**Practice Scenario**

Imagine that you are a school principal and a situation arises that requires you to apply your memo and business letter writing skills.

One of your first grade students has a physical handicap, but his primary problem is a social one that emerged in kindergarten and now has resurfaced in the first grade. Teachers have reported this student behaving uncooperatively and aggressively, specifically pushing and biting other children and getting into fights.

While the child has made great strides in making progress and the number of incidents has decreased significantly, recent incidents have prompted several parents in the first grade class to organize and demand the removal of this child from the classroom.

The Superintendent, Dr. Lauren Kearney, has called you wanting to know what is happening and what you plan to do to resolve the issue.

What you know about the situation is outlined by the views held by the following individuals:

- Principal - Lee Schmidt (You are the Principal)
- Teacher - Lisa Hammond
- Child's Mother - Susan McBurney
- Neutral First Grade Parent – not named
- Parent of Hurt Child - Mrs. Swanson
- Role of Parent Who Kept Children at Home – not named

The entire case study can be found in the Appendix F. Read the entire case and analyze the situation. Then prepare a memo to the Superintendent and a letter to Mrs. Swanson, mother of hurt child.

---



### Final Practice Worksheet

Identify your purpose.

- I want (WHO) \_\_\_\_\_ to do (WHAT) \_\_\_\_\_  
because (REASON) \_\_\_\_\_.
- I expect to inform, describe, persuade, command, or show appreciation. (choose one)

Choose the best organizational strategy to shape your message.

- |  |   |  |
|--|---|--|
| <input type="checkbox"/> Analytical    | <input type="checkbox"/> Inductive          | <input type="checkbox"/> Topic           |
| <input type="checkbox"/> Chronological | <input type="checkbox"/> Need/ Plan/Benefit | <input type="checkbox"/> Question/Answer |
| <input type="checkbox"/> Deductive     | <input type="checkbox"/> Problem/Solution   | <input type="checkbox"/> Other: _____    |

Use a word processing program, such as Word, to draft the memo based on the information you have identified so far. Check for educational jargon and unnecessary details, and edit the memo according to the editing checklist. (See sample editing checklist in Appendix B) Attach a copy of the draft.

Summarize the feedback provided from the peer review of your memo.

Attach a copy of your finalized **memo**.

### Final Practice Worksheet

To prepare for writing the business letter, first analyze the issues.

What are the key issues you are addressing with this audience?

Next, analyze your audience and tone.

- What is the anticipated attitude of the reader: neutral, positive, negative?
  
- What information does this audience need to accept?
  
  
- What information do you think they are willing to accept?
  
  
- What tone do you need to convey in order to make this an effective communication piece?
  - Authoritative
  - Collaborative
  - Complimentary
  - Supportive
  - Informal/Friendly
  - Objective
  - Other: \_\_\_\_\_

### Final Practice Worksheet

Identify your purpose.

- I want (WHO) \_\_\_\_\_ to do (WHAT) \_\_\_\_\_  
because (REASON) \_\_\_\_\_.
- I expect to inform, describe, persuade, command, or show appreciation. (choose one)

Choose the best organizational strategy to shape your message.

- |  |   |  |
|--|---|--|
| <input type="checkbox"/> Analytical    | <input type="checkbox"/> Inductive          | <input type="checkbox"/> Topic           |
| <input type="checkbox"/> Chronological | <input type="checkbox"/> Need/ Plan/Benefit | <input type="checkbox"/> Question/Answer |
| <input type="checkbox"/> Deductive     | <input type="checkbox"/> Problem/Solution   | <input type="checkbox"/> Other: _____    |

Use a word processing program, such as Word, to draft the letter based on the information you have identified so far. Check for educational jargon and unnecessary details, and edit the letter according to the editing checklist. (See sample editing checklist in Appendix B) Attach a copy of the draft.

Summarize the feedback provided from the peer review of your letter.

Attach a copy of your finalized **letter**.

### Final Practice Performance Checklist

**Select one:**    Performer's self-assessment    Performance Coach's observations

**Performer's Name:** \_\_\_\_\_

**Performance Coach's Name:** \_\_\_\_\_

**Date of Performance:** \_\_\_\_\_

*Check off each criterion that is observed. If the performance meets criteria with satisfactory quality, mark Yes. If not, mark No and provide feedback (use the back of the page for more space). Enter this performance into your portfolio when **all** items are marked Yes and **all** Feedback Form (next form) items are marked 3 or 4 (or Not Applicable).*

Evidence	Criteria	Proficient? Give Feedback.
1. The issues were analyzed for the memo	<input type="checkbox"/> The key issues are listed for the memo	<input type="checkbox"/> Yes <input type="checkbox"/> No
2. Audience attitude and required tone have been considered	The following information is present: <input type="checkbox"/> The anticipated attitude of the reader <input type="checkbox"/> The information this audience <u>needs</u> to accept <input type="checkbox"/> The information this audience <u>is willing</u> to accept <input type="checkbox"/> The tone needed for making this an effective communication piece	<input type="checkbox"/> Yes <input type="checkbox"/> No
3. The purpose for the memo has been defined	<input type="checkbox"/> Who, what, and reason are present <input type="checkbox"/> One of the following has been selected: inform, describe, persuade, command, or show appreciation	<input type="checkbox"/> Yes <input type="checkbox"/> No
4. An organizational approach has been selected for the memo	<input type="checkbox"/> An organizational strategy for shaping the message has been selected	<input type="checkbox"/> Yes <input type="checkbox"/> No

Evidence	Criteria	Proficient? Give Feedback.
5. The memo was drafted	<input type="checkbox"/> A copy of the draft is present	<input type="checkbox"/> Yes
	<input type="checkbox"/> Educational jargon, if present, is clarified	<input type="checkbox"/> No
	<input type="checkbox"/> No unnecessary details are present	
6. Editing and peer review have been completed	<input type="checkbox"/> A summary of the peer review feedback is present	<input type="checkbox"/> Yes
		<input type="checkbox"/> No
7. The memo has been finalized	<input type="checkbox"/> A copy of the final memo is present	<input type="checkbox"/> Yes
		<input type="checkbox"/> No
8. The issues were analyzed for the business letter	<input type="checkbox"/> The key issues are listed	<input type="checkbox"/> Yes
		<input type="checkbox"/> No
9. Audience attitude and required tone have been considered	The following information is present:	<input type="checkbox"/> Yes
	<input type="checkbox"/> The anticipated attitude of the reader	<input type="checkbox"/> No
	<input type="checkbox"/> The information this audience <u>needs</u> to accept	
	<input type="checkbox"/> The information this audience <u>is willing</u> to accept	
	<input type="checkbox"/> The tone needed for making this an effective communication piece	
10. The purpose for the letter has been defined	<input type="checkbox"/> Who, what, and reason are present	<input type="checkbox"/> Yes
	<input type="checkbox"/> One of the following has been selected: inform, describe, persuade, command, or show appreciation	<input type="checkbox"/> No

Evidence	Criteria	Proficient? Give Feedback.
11. An organizational approach has been selected for the letter	<input type="checkbox"/> An organizational strategy for shaping the message has been selected	<input type="checkbox"/> Yes <input type="checkbox"/> No
12. The letter was drafted	<input type="checkbox"/> A copy of the draft is present <input type="checkbox"/> Educational jargon, if present, is clarified <input type="checkbox"/> No unnecessary details are present	<input type="checkbox"/> Yes <input type="checkbox"/> No
13. Editing and peer review have been completed	<input type="checkbox"/> A summary of the peer review feedback is present	<input type="checkbox"/> Yes <input type="checkbox"/> No
14. The letter has been finalized	<input type="checkbox"/> A copy of the final letter is present	<input type="checkbox"/> Yes <input type="checkbox"/> No

**Final Practice Feedback Form (page 1 of 2)**

**Performer's Name:** \_\_\_\_\_

**Performance Coach's Name:** \_\_\_\_\_

**Date of Performance:** \_\_\_\_\_

*Use the rubric below to rate **only** the cross-cutting leadership skills on this page (including write-ins). Enter this performance into your portfolio when **all** Performance Checklist (previous form) items are marked Yes and **all** Feedback Form (this form) items are marked 3 or 4 (or Not Applicable).*

Performance Levels			
1	2	3	4
<b>Emerging</b> Needs Study and Practice <i>Few/none of desired behaviors were adequately displayed.</i>	<b>Developing</b> Needs Practice <i>Some but not all of the desired behaviors were adequately displayed.</i>	<b>Proficient</b> Meets Criteria and Expectations <i>All desired behaviors were displayed and performed correctly.</i>	<b>Distinguished</b> Could be Used as a Model to Teach Others

**Eligible for Portfolio**

How effective was the performer in these Cross-Cutting Skills?		Rating				
1.	Facilitating group interaction and managing participation	1	2	3	4	n/a
2.	Assisting the group to meet task criteria	1	2	3	4	n/a
3.	Modeling appropriate leadership behaviors	1	2	3	4	n/a
4.	Teaching others how to perform the tasks	1	2	3	4	n/a
5.	Presenting information clearly and concisely	1	2	3	4	n/a
6.	Leveraging technology to increase effectiveness	1	2	3	4	n/a
7.	Motivating others to achieve success	1	2	3	4	n/a
8.	Using group processes to achieve desired results	1	2	3	4	n/a
9.	Other:	1	2	3	4	n/a

**Turn the page to provide additional written feedback (required).**

**Final Practice Feedback Form (page 1 of 2)**

**Performer's Name:** \_\_\_\_\_  
**Performance Coach's Name:** \_\_\_\_\_  
**Date of Performance:** \_\_\_\_\_

If any element was rated less than 3, what needs to be done to score a 3? To score a 4?

What greatest strengths did the leader exhibit through this performance?

What could be done to improve this leader's performance? Include any criteria on the Performance Checklist that were missed. Be specific.

Were there any significant issues that must be rectified (by additional practice and assessment) before entering this evidence into the Portfolio?

# Final Assessment

**When Can I Take the Final Assessment?**

Complete the Final Assessment when you are able to sufficiently execute the module’s performance objective(s) according to the:

- Task-related criteria on the Final Assessment Performance Checklist
- Cross-cutting leadership skills on the Performance Feedback Form

When you take the Final Assessment — either as someone who takes it to “test out” of the module or as someone who has worked through the topics and Final Practice — the underlying assumption is that you are a competent, experienced, performer. This means that the Final Assessment does not include any “helps,” such as step-action tables or worksheets.

**When Can I Add the Final Assessment to My Portfolio?**

Has your Final Assessment performance met all the criteria on the Final Assessment Performance Checklist and earned at least a 3 on all of the cross-cutting skills on the Final Assessment Feedback Form?

Yes	No
<p>Add these items to your Portfolio and talk to your Performance Coach about next steps:</p> <ul style="list-style-type: none"> <li>• Final Assessment Performance Checklist</li> <li>• Final Assessment Feedback Form</li> <li>• Module Progress Tracker page</li> <li>• Additional artifacts such as documents, slides, video tapes, participant feedback forms, etc.</li> </ul>	<p>Do the following as needed before attempting the Final Assessment again when you are ready:</p> <ul style="list-style-type: none"> <li>• Obtain performance feedback from your Performance Coach</li> <li>• Review relevant topics in the module</li> <li>• Repeat Topic Practices and/or the Final Practice</li> <li>• Pursue additional learning, training and experience</li> </ul>

**Final Assessment  
Instructions**

1. Gain permission from your supervisor, sponsor, or Performance Coach to complete the Final Assessment in a school setting.
2. Schedule the date, time and location of your session — one that works for you, your Performance Coach, and other participants.
3. Invite a group of 2 - 4 volunteers to assist you. Ideally, you should invite your real work team. (If you are an aspiring leader, this may be a team that you would lead once you enter the leadership role. For an incumbent leader, it should reflect the team or type of team that you are currently leading.)
4. Review the following with your Performance Coach:
  - Task-related criteria on the Final Assessment Performance Checklist
  - Cross-cutting leadership skills on the Performance Feedback Form
  - Final Assessment Scenario (on the next page)
5. Prepare any other materials or information that you and your participants need to have with you on the day of the activity.
6. Perform the Final Assessment as follows:
  - In a real school or district setting
  - With a team of teachers, staff, or other leaders as appropriate
  - Observed by your Performance Coach
7. Retain artifacts from your performance (documents, slides, etc.)
8. Obtain feedback from your Performance Coach about your performance, and discuss next steps.

---

**Final Assessment  
Scenario**

Work with your coach to identify a situation in your school that requires a written response to both an internal and external reader. Write a memo for internal communication and a business letter for an external reader.

---

**Final Assessment Performance Checklist**

**Select one:**    Performer’s self-assessment    Performance Coach’s observations

**Performer’s Name:** \_\_\_\_\_

**Performance Coach’s Name:** \_\_\_\_\_

**Date of Performance:** \_\_\_\_\_

*Check off each criterion that is observed. If the performance meets criteria with satisfactory quality, mark Yes. If not, mark No and provide feedback (use the back of the page for more space). Enter this performance into your portfolio when **all** items are marked Yes and all Feedback Form (next form) items are marked 3 or 4 (or Not Applicable).*

Evidence	Criteria	Proficient? Give Feedback.
1. The issues were analyzed for the memo	<input type="checkbox"/> The key issues are listed for the memo	<input type="checkbox"/> Yes <input type="checkbox"/> No
2. Audience attitude and required tone have been considered	The following information is present: <input type="checkbox"/> The anticipated attitude of the reader <input type="checkbox"/> The information this audience <u>needs</u> to accept <input type="checkbox"/> The information this audience <u>is willing</u> to accept <input type="checkbox"/> The tone needed for making this an effective communication piece	<input type="checkbox"/> Yes <input type="checkbox"/> No
3. The purpose for the memo has been defined	<input type="checkbox"/> Who, what, and reason are present <input type="checkbox"/> One of the following has been selected: inform, describe, persuade, command, or show appreciation	<input type="checkbox"/> Yes <input type="checkbox"/> No
4. An organizational approach has been selected for the memo	<input type="checkbox"/> An organizational strategy for shaping the message has been selected	<input type="checkbox"/> Yes <input type="checkbox"/> No

Evidence	Criteria	Proficient? Give Feedback.
5. The memo was drafted	<input type="checkbox"/> A copy of the draft is present	<input type="checkbox"/> Yes
	<input type="checkbox"/> Educational jargon, if present, is clarified	<input type="checkbox"/> No
	<input type="checkbox"/> No unnecessary details are present	
6. Editing and peer review have been completed	<input type="checkbox"/> A summary of the peer review feedback is present	<input type="checkbox"/> Yes
		<input type="checkbox"/> No
7. The memo has been finalized	<input type="checkbox"/> A copy of the final memo is present	<input type="checkbox"/> Yes
		<input type="checkbox"/> No
8. The issues were analyzed for the business letter	<input type="checkbox"/> The key issues are listed	<input type="checkbox"/> Yes
		<input type="checkbox"/> No
9. Audience attitude and required tone have been considered	The following information is present:	<input type="checkbox"/> Yes
	<input type="checkbox"/> The anticipated attitude of the reader	<input type="checkbox"/> No
	<input type="checkbox"/> The information this audience <u>needs</u> to accept	
	<input type="checkbox"/> The information this audience <u>is willing</u> to accept	
	<input type="checkbox"/> The tone needed for making this an effective communication piece	
10. The purpose for the letter has been defined	<input type="checkbox"/> Who, what, and reason are present	<input type="checkbox"/> Yes
	<input type="checkbox"/> One of the following has been selected: inform, describe, persuade, command, or show appreciation	<input type="checkbox"/> No

Evidence	Criteria	Proficient? Give Feedback.
11. An organizational approach has been selected for the letter	<input type="checkbox"/> An organizational strategy for shaping the message has been selected	<input type="checkbox"/> Yes <input type="checkbox"/> No
12. The letter was drafted	<input type="checkbox"/> A copy of the draft is present <input type="checkbox"/> Educational jargon, if present, is clarified <input type="checkbox"/> No unnecessary details are present	<input type="checkbox"/> Yes <input type="checkbox"/> No
13. Editing and peer review have been completed	<input type="checkbox"/> A summary of the peer review feedback is present	<input type="checkbox"/> Yes <input type="checkbox"/> No
14. The letter has been finalized	<input type="checkbox"/> A copy of the final letter is present	<input type="checkbox"/> Yes <input type="checkbox"/> No

**Final Assessment Feedback Form (page 1 of 2)**

**Performer's Name:** \_\_\_\_\_

**Performance Coach's Name:** \_\_\_\_\_

**Date of Performance:** \_\_\_\_\_

*Use the rubric below to rate **only** the cross-cutting leadership skills on this page (including write-ins). Enter this performance into your portfolio when **all** Performance Checklist (previous form) items are marked Yes and **all** Feedback Form (this form) items are marked 3 or 4 (or Not Applicable).*

Performance Levels			
1	2	3	4
<p><b>Emerging</b> Needs Study and Practice <i>Few/none of desired behaviors were adequately displayed.</i></p>	<p><b>Developing</b> Needs Practice <i>Some but not all of the desired behaviors were adequately displayed.</i></p>	<p><b>Proficient</b> Meets Criteria and Expectations <i>All desired behaviors were displayed and performed correctly.</i></p>	<p><b>Distinguished</b> Could be Used as a Model to Teach Others</p>

**Eligible for Portfolio**

How effective was the performer in these Cross-Cutting Skills?		Rating				
1.	Facilitating group interaction and managing participation	1	2	3	4	n/a
2.	Assisting the group to meet task criteria	1	2	3	4	n/a
3.	Modeling appropriate leadership behaviors	1	2	3	4	n/a
4.	Teaching others how to perform the tasks	1	2	3	4	n/a
5.	Presenting information clearly and concisely	1	2	3	4	n/a
6.	Leveraging technology to increase effectiveness	1	2	3	4	n/a
7.	Motivating others to achieve success	1	2	3	4	n/a
8.	Using group processes to achieve desired results	1	2	3	4	n/a
9.	Other:	1	2	3	4	n/a

**Turn the page to provide additional written feedback (required).**

**Final Assessment Feedback Form (page 1 of 2)**

**Performer's Name:** \_\_\_\_\_  
**Performance Coach's Name:** \_\_\_\_\_  
**Date of Performance:** \_\_\_\_\_

If any element was rated less than 3, what needs to be done to score a 3? To score a 4?

What greatest strengths did the leader exhibit through this performance?

What could be done to improve this leader's performance? Include any criteria on the Performance Checklist that were missed. Be specific.

Were there any significant issues that must be rectified (by additional practice and assessment) before entering this evidence into the Portfolio?

# Appendix A: Sample Memo

<p>Form: Memo to Staff                  Purpose: To Persuade                  Audience: Certified Teaching Staff                  Tone: Supportive                  Strategy: Need/Plan/Benefit</p>	<p><b>Document Analysis</b></p>
<p><b>MEMORANDUM</b></p> <p><b>TO:</b> Teaching Staff</p> <p><b>FROM:</b> E.S. Principal ESP</p> <p><b>RE:</b> Teacher Evaluation</p> <p><b>DATE:</b> September 12, 2007</p> <p>The philosophy and purpose of teacher evaluation is to focus our attention on teaching and learning in our school. The process should provide valuable information for us to use in developing the best learning environment for our students; in addition, it should also create a climate that stimulates our own professional growth. The bottom line is, always will be, how staff impacts on our students' well-being and educational progress.</p> <p>One of our district goals developed jointly by the two building teams is to explore alternative assessment methods for both students and teachers. I would like to begin this process with an alternative assessment suggestion for our teacher evaluation program. The Teacher Portfolio Assessment is not a cumbersome process and allows a lot of flexibility in its format and design.</p> <p>Take some time to review the attached overview of this type of assessment. Think about it, ask questions, and decide if you would like to experiment with it. This is not mandatory; it is strictly voluntary on your part. If you would like to give it a try, work on the goals section and then set up an initial meeting with me to begin the process. I would like to have the initial meetings completed by the second week in October. If you decide this assessment process is not for you, you will be evaluated in the same manner used last year.</p> <p>I hope that many of you will take advantage of this new format. This self-directed goal-setting approach to teacher evaluation is fairly new, but research indicates that teachers find it personally rewarding and professionally meaningful—something we all hope to find during our careers. Specifically, I believe it will benefit you in three ways:</p> <ol style="list-style-type: none"> <li>1. Allows the teacher to identify and set targeted goals based on individual needs, skills, and experiences;</li> <li>2. Provides flexibility in collecting and reviewing data to support goal achievement;</li> <li>3. Empowers teachers to take charge of their professional development.</li> </ol> <p>Please let me know your intentions by September 20th so that I can begin my planning and scheduling process.</p> <p>ES/sf</p> <p>Encl.1: Teacher Portfolio Overview</p>	<p>Writers initials</p> <p>Introduces the topic Describes the current need</p> <p>Outlines the plan</p> <p>Provides supporting details in an addendum</p> <p>Summarizes the benefits of the plan.</p> <p>Uses the active voice</p> <p>Keeps sentences short and clear</p> <p>Uses a listing format</p> <p>Indicates action requested</p> <p>Reference Initials</p> <p>Enclosure notation</p>

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# Appendix B: Sample Editing Checklist

This checklist may provide a strategy to use in checking the basic features of your writing. Select one or two of your writing products and use this checklist to assess your writing. Ask a colleague to critique the same writing documents. What are your strength areas? What are your growth targets? Use this key to guide your assessment

## Assessment Key

### **1=Low Skill-**

The feature is not evident or performance is inconsistent. There are many errors.

### **2=Moderate Skill-**

The feature is evident and the performance shows consistent and correct application. There are few errors.

### **3=High Skill-**

The feature is very evident and the performance is very consistent and correct. There are no technical errors.

## **Organization**

- I have identified my purpose.
- I have assessed my audience.
- I have stated my main points clearly.
- I have enough details to support my purpose.
- I have organized the content logically/sequentially.
- I have used effective transitions.

## **Sentence Structure**

- My sentence length is between 18 and 20 words.
- I have used the active voice.
- I have no sentence fragments or run-ons.
- My paragraphs include a variety of sentence types.(Simple, compound, and complex)
- The sentences have clear subjects and verbs.

*Continued next page*

### **Grammatical Errors**

- The verbs agree with their subjects.
- The pronouns have clear antecedents.
- I have not used an adjective in place of an adverb.
- None of my modifiers are misplaced.
- I have made no shifts in tense.

### **Word Choice**

- I have used action-oriented verbs.
- I have avoided words with negative connotations.
- I have omitted unnecessary words and expressions.
- I have avoided clichés and educational jargon.
- I have chosen words that say exactly what I mean.
- My sentences do not begin with overused phrases.
- My writing conveys my intended tone.

### **Mechanics**

- No words are misspelled.
- I have eliminated unnecessary commas.
- I have not used unnecessary quotation marks or exclamation points.
- I have made any abbreviations clear.
- I have not accidentally omitted a word or sentence.
- My document looks professional.
- I have used headings and subheadings.
- I have varied the font style and size.
- I have utilized the computer to enhance my written documents.

# Appendix C: Revised Memo

<p style="text-align: center;"><b>Memo Revision-After</b></p>	<p><b>Purpose:</b> To Inform/Announce  <b>Audience:</b> Staff  <b>Tone:</b> Collaborative  <b>Organizational Strategy:</b> Five W's</p>
<p><b>MEMORANDUM</b></p> <p>October 15, 2007</p> <p>TO: Staff Members                      FR: Martha Murphy                      RE: Teacher Workshop</p> <p style="text-align: center;">BAKER COUNTY</p> <p style="text-align: center;">STAFF DEVELOPMENT DEPARTMENT</p> <p style="text-align: center;"><b><u>INVITES YOU TO A CLASSROOM MANAGEMENT WORKSHOP</u></b></p> <p style="text-align: center;"><u>with</u></p> <p style="text-align: center;"><b><u>Dr. Discipline</u></b></p> <p style="text-align: center;"><b><u>Friday, November 10</u></b></p> <p style="text-align: center;"><b><u>4 to 6 P.M.</u></b></p> <p style="text-align: center;"><u>Baker County Staff Development Center</u></p> <ul style="list-style-type: none"> <li>• Why am I experiencing more student misbehavior in my classroom?</li> <li>• What effect does changing demographics have on my school and its local community?</li> <li>• How can I incorporate additional behavior management strategies into my overall classroom management plan?</li> </ul>	<p>Tells the readers what they need to know up front</p> <p>Who</p> <p>What</p> <p>When</p> <p>Where</p> <p>Why</p> <p>Relates the workshop to the reader's needs. Uses summary statements and bullets to highlight</p>

**Tune in Friday, November 10**, and learn how we can all work together to develop our classroom management skills.

Discover how different ethnic and cultural groups respond to various discipline approaches. Then give us your feedback, questions, and suggestions for other professional learning programs.

We look forward to your participation.

Summarizes the message

Keeps sentences between 18-20 words

# Appendix D: Sample Business Letter

Form: Letter of Recommendation Purpose : Job Recommendation Audience: Peer Tone: Complimentary Strategy: Inductive/Topic Approach	Document Analysis
<p>May 9, 2007</p> <p>Mr. John Jackson, Principal                      Fanning City High School                      25 Sky Lane                      Denver, CO 23567</p> <p><b>SUBJECT: Letter of recommendation for Mr. Dan Owen.</b></p> <p>Dear Mr. Jackson:</p> <p>Mr. Dan Owen has asked me to write a letter of recommendation concerning his application for a teaching position in your social studies department.</p> <p><b>Background Information:</b>                      Dan Owen was hired in the spring of 1993 as a permanent substitute in social studies for an indefinite period. While we made a commitment to him through the end of June, it was made clear that we didn't know when or if the teacher he was replacing would return. Since the bulk of his teaching schedule terminated in a Global Studies Regents, we were highly concerned about the students' preparation for these difficult exams. As a result of his conscientious efforts and the confidence he inspired in the students, the students completed the year on a very positive note with more than 80% passing the Regents exam.</p> <p>Having observed Mr. Owen in a very difficult set of circumstances and knowing that both students and parents were very pleased with his ability to motivate the reluctant learner, we hired Mr. Owen for a full-time tenured track position when we had the opportunity during the following fall.</p> <p><b>Credentials:</b>                      Mr. Owen's training and preparation are largely in American History. He has been teaching both Regents and non-Regents eleventh graders over the past two school years. However, wishing to expand his background and make himself more flexible, he requested to teach ninth grade Global Studies on both the Regents and non-Regents level. To his credit, he has expended an inordinate amount of time in order to develop his own expertise in non-Western history. His lesson plans are detailed and include activities that are thought-provoking and require cooperative learning efforts.</p>	<p>Date Line</p> <p>Inside Address</p> <p>Subject Line</p> <p>Formal Greeting</p> <p>First paragraph states the purpose.</p> <p>Uses headings to allow the reader to scan for information</p> <p>Summarizes background information concerning hiring circumstances.</p> <p>Praises the teacher and stresses results</p> <p>Provides specific details regarding teaching background and subjects taught.</p> <p>Points out teacher's initiative to expand knowledge base</p> <p>Points out instructional strengths</p>

<p><b>Professional Recommendation:</b> Dan Owen is an asset to our Social Studies Department and I will regret losing him. He is young and responsive to constructive criticism. He is hard-working and relates to young adults in an extremely positive manner. His classes are interesting and his students truly enjoy them. During his two and a half years, he demonstrated high skill in classroom management. I am sure he will make the same positive contribution to your high school as he has to mine.</p> <p>Sincerely,</p> <p><i>Margaret Mills, Ph.D.</i></p> <p>Margaret Mills, Ph.D. Principal MM/dh</p>	<p>Ends with a strong recommendation</p> <p>Summarizes teaching skills and professional qualities</p> <p>Sentences are short and clear</p> <p>Closing</p> <p>Signature</p> <p>Reference Initials</p>
--	--

# Appendix E: Revised Business Letter

Business Letter Revision-After	<b>Purpose:</b> To request action <b>Audience:</b> Community member <b>Tone:</b> Authoritative <b>Organizational Strategy:</b> Problem-Solution
<p>January 26, 2007</p> <p>Mr. Pete Smith, President                      Cherokee Fencing Company                      PO Box 100                      Detroit, MI 30032</p> <p><b>RE: Immediate Repairs to School Fence</b></p> <p>Dear Mr. Smith:</p> <p>I will call you Friday morning to find out when you will be able to complete the repairs of the new fencing surrounding the primary children’s recreational area. This problem was first noted by the teachers more than two weeks ago on January 12, and should have been fixed immediately to eliminate the potential danger for our students. As you know, this fencing protects the children from a very busy thoroughfare in the community.</p> <p>As we discussed on January 13 after the teachers reported the problem and again on January 20, the two support posts have been pulled out of the ground. Our children could gain access to a main street by pulling or pushing the wire fence over.</p> <p>I have every expectation that you will attend to this matter quickly. I have appreciated doing business with you and have no complaints with the quality of your work. However, if action is not taken within five days, I will have to refer this matter to the school’s legal department.</p> <p>Sincerely,</p> <p><i>Jane Alexander</i></p> <p>Principal</p> <p>cc: David Richards, Assistant Superintendent for School Operations</p>	<p>Subject line</p> <p>Indicates problem.                      Writer notifies the reader that she wants to know repair schedule.                      States action requested to fix problem situation</p> <p>Documents the events in case of future legal action</p> <p>No griping, or ranting;                      States the facts and what action will follow if the situation is not corrected</p> <p>More formal closing</p> <p>Notifies central office of potentially dangerous situation and action taken</p>

# Appendix F: Case Study

## ACCESS TO EDUCATION — IT STARTS IN FIRST GRADE

The small town of Middleville, located near a large metropolitan area, is in the midst of a controversy that touches every citizen in some way. There are four elementary schools in town, and they all have been a source of community pride. However, one of them is now the focus of a heated dispute.

One student's behavior has fueled the controversy. A first grader, Tommy McBurney, began the school year with 20 other first graders in Lisa Hammond's class. Prior to the school year Tommy's mother, Susan, met with Lisa Hammond, the school's resource specialist, and the Manager. They met to discuss how to handle Tommy. Susan McBurney, his mother, told the group that she had used social service agencies in the community to help Tommy. Tommy has a physical handicap, but his primary problem is a social one. He used to get into fights, bite children, push others, and have difficulty doing any activities that involved cooperation. In the special program he attended for kindergarten, he made great progress, was eventually accepted by the other children, and was ready for the first grade both academically and socially.

Susan wanted the teacher to be aware of the problems, to make sure that they did not recur, and to let Lisa know that she would do whatever was needed to help with the transition. At the start of the school year the problems that Tommy had experienced in the previous year recurred. After several conferences and attempts on the part of Lisa Hammond to deal with Tommy's behavior, the Manager and the resource specialist, with the approval of Tommy's mother, revised his IEP (Individualized Educational Plan). The revised IEP provided Tommy's teacher with a special classroom aide to assist Tommy in overcoming his tendencies to disrupt the learning environment. Tommy has been making progress and the number of incidents is now decreasing to the point where Lisa feels that the other students will begin to accept him. Unfortunately, Tommy has hit two students this year and bitten another. These incidents have prompted parents to organize and demand his removal from the classroom. In fact, 60% of the students in Lisa Hammond's class were kept home by their parents yesterday in protest of Tommy's being in the classroom.

The superintendent phoned this morning while you (the Principal) were out of the office and left the following message with your secretary: I understand that there is some trouble in one of your first grade classrooms. Let me know what's happening and what you intend to do about it. When I return from my meeting with the State Superintendent later this afternoon, I want your answer on my desk. What you know about the situation is contained on the pages that follow. You will learn about the views held by: the Manager, the teacher, Tommy's mother, the parent of a child who was attacked by Tommy, a parent who kept her child home in support of the hurt children, and a parent who is neutral on the issue.

**PRINCIPAL: LEE SCHMIDT**

You and the teacher, Lisa Hammond (last year's Teacher of the Year), have been working to make this situation into a positive one for Tommy. There is district policy, of course, which attempts to mainstream special needs children as much as possible. Tommy's physical handicap is relatively minor... He walks with a slight limp and is restricted from participating in some playground activities. From the very first meeting that the two of you held with Susan McBurney before school started, you were impressed with her willingness to work with Tommy to help him adapt. The resource specialist talked with the kindergarten staff from Tommy's previous school.

That conversation resulted in your believing that Tommy could learn best in a regular classroom and that there would be ways to cope with his adjustment problems if any occurred. You believe that Lisa has done an excellent job of managing the classroom. You have observed the class on numerous occasions and agree with Lisa that Tommy is showing steady progress. Now that the decision was made to hire the aide, classroom activities seem to be proceeding almost normally. Tommy is learning to work with other pupils and they are accepting them.

The incidents which have occurred to date have involved biting or kicking. Some thought was given to removing Tommy after the last biting incident, but the weight of the evidence was that the little girl had teased Tommy enough to precipitate a reaction. Lisa has been helping the girl (Julie) learn to appreciate Tommy. You and Lisa hope that the additional aide will no longer be necessary after the first of the year. The resource specialist and the district social worker both believe that Tommy belongs in the classroom. They are concerned about his self-esteem should he be segregated. In fact, they are concerned now with the entire class, since the parents have kept so many of the children home. They believe that Lisa will need help in the classroom to reinstall cooperative group behavior and to help the children understand each other. They also believe that the children are far more ready to get along well than are their parents. Finally, they believe that the lesson of community help, and dealing with people who have problems rather than isolating them, are useful learning experiences for all children.

You are devastated by the parental action of keeping children home without any attempt to talk it out first. While a few of the parents have been in touch, the action by a majority of the parents was totally unexpected. You are also worried about maintaining the support of the Superintendent and the School Board. So far, the Superintendent and the Board have supported your decisions. However, you fully understand that the support may be short-lived. Julie's (the little girl who was most recently bitten by Tommy) parents have many friends in the community and two close friends on the School Board. You sense that the Superintendent and the Board would prefer to avoid controversy and would allow Tommy's mother to transfer him to another school inside or outside the district.

### **THE TEACHER: LISA HAMMOND**

This year has been a roller coaster for Lisa. Her heart goes out to Tommy. Even though he has been the most difficult child she has ever dealt with, he can be such a wonderful child. She wants to prove that she can deal with this problem and still keep a positive educational experience for all the children in her class. She feels betrayed by the parents who kept their children home, since they ruined the positive climate she had worked so hard to create. Who do they think they are interfering with what is already working and with what should be the decision of the administration? She also feels compassion for Susan McBurney who gives Tommy a great deal of time and attention. Because Susan has tried everything the administration suggested that she do at home to help Tommy, Lisa wants to do everything for her.

Lisa believes that this is fundamentally an issue of who controls the bottom-line educational decisions about what goes on in the classroom. If the Manager bows to this particular group of parents, pretty soon they will be running things completely. Where is educational expertise in that scenario? Lisa feels that transferring Tommy to another class, school, or district would only exacerbate his problems.

### **TOMMY'S MOTHER**

Susan McBurney, Tommy's mother, is a member of the Special Education Advocacy Group. The advocacy group recognizes that this is a landmark, precedent-setting case for them in terms of the ability to mainstream special education children. Therefore, the advocacy group has aligned with Tommy's mother and states it will fight tooth and nail to ensure that Tommy has educational access.

Susan works hard to support herself and her child since her husband left her four years ago. She is employed full-time as a shift supervisor at Prentiss Manufacturing Company. Since she discovered Tommy's difficulties at the age of two, she has worked closely with the family caregivers, the special day care school he attended for kindergarten, and now with his teacher, Lisa Hammond. Susan is frankly confused and hurt by the latest action of many of the parents in Tommy's class. She remained in the small community at the time of her husband's leaving because she felt the environment would be a much better one in which to rear her child. She felt a small community would give her and her son the support they needed and not expose them to the whims of life in the large metropolitan area. Up until now she has felt very satisfied with that choice.

Susan finds the parents' actions doubly difficult to understand because the children have for the most part been nice to Tommy. Tommy likes Lisa Hammond very much and talks positively about many of the boys and girls in his class. Susan realizes that new settings have always been difficult for Tommy, but she now sees all the signs of his adapting. She is extremely worried and even frightened of what another change of setting might do to Tommy's fragile self-esteem. She is willing to do whatever is necessary to make sure this does not happen. Susan is

pleased that the Special Education advocacy group is supporting her; however, she does not want Tommy treated as a test case. Tommy is her child, and she wants what is best for him.

Susan has a good relationship with Lisa Hammond and also believes that the Principal, Lee Schmidt, is on Tommy's side. Susan hopes that neither will bow to the pressure of other groups and decide something that is not in Tommy's best interests. She knows that Tommy has been happier and even sleeps better at night ever since the school hired the special aide. Susan feels badly that Tommy hurt three of the children in the classroom, but she also knows that some of their bruises were no worse than typical bruises received during recess. She has conveyed her apologies through Lisa Hammond to the other parents, but did not feel that it was appropriate to call personally. Finally, Susan is worried about what might happen if someone were to suggest that she was not capable of caring for her child. She has heard horror stories of fathers who returned and reclaimed their children because their mothers could not rear them. While she does not believe there is much possibility of this, it still lingers in her mind.

The Special Education Advocacy Group wants very much to help Tommy, Susan, and others who face similar circumstances. Susan believes that the basic problem is an educational one. If the parents who protested having Tommy in the classroom could understand his behavior and how much he needs a "normal" existence to overcome his difficulties, they might just welcome him. Susan has research data that show both the child who needs special attention and the "normal" children in the classroom benefit from the interaction and the joint learning experience. Tommy has just as much right to live in the community and be a part of it as any other child in the school. Transferring Tommy to another school or even another classroom would send a message to him that he might never overcome. He always experiences difficulties in adapting to a new situation, and a change now would exacerbate his problem.

### **NEUTRAL PARENT**

I am sympathetic to what the administration is attempting to do for Tommy. I will most likely support the Principal, unless the other parents tell me something that changes my mind.

When I received the call a few days ago about the proposed boycott of the classroom, I was shocked. I basically believe that adults have the capacity to work things out through mutual agreement and negotiation. I cannot believe that some of the parents would be so childish as to believe that this is the only course of action available to them. On the other hand, I know many of these parents and believe that they are basically reasonable people. Therefore, I have a sense that there may be some perspectives that I do not yet understand. I am curious about what these various viewpoints are.

I have always believed that educators know what is best for the children in the classroom. While I have a few times been disappointed by the quality of the teacher one or the other of my children have had, I am generally pleased with the educational system in Middleville. I spoke briefly to Lisa Hammond about the situation last Friday, and feel she is doing her best and ought to be given more of a chance. However, I am not in favor of a chance that would go on forever.

Lisa told me the child was improving. I have no reason to doubt that, and I believe that exposure to someone who is different might possibly be good for my child. My child has talked about Tommy; when he came home from school on Monday, he wanted to know why the other children stayed home. He said that Miss Hammond had told them that some of the parents were mad at her and the Manager for something. She said that she hoped talking would help solve it. I did not tell my child why the parents were mad at Lisa because I did not want to make it any more difficult for Tommy or suggest to my child that Tommy should be ignored.

I feel sorry for Tommy; yet, I also want the best classroom experience for my child and all the others in the grade. I do not want my child picked on by the other children tomorrow when the class is back together and the kids talk about why they stayed home. I wish that Lisa and the Manager had communicated earlier about this situation to the entire parents' group so they could have been more supportive. On the other hand, I know that some people are just plain reactionary. I have been trying to help my child understand Tommy's behavior so that he does not just hear about Tommy from the other children. They are not always kind.

I am interested too in district policy regarding teaching special needs children. I suspect they need to be with their own group for most of the day, and then have some time with a regular class. Perhaps this would be a way to develop a compromise. I am interested in what the administration and the teacher have to say. Depending on their plan, and on the additional facts from my friends, I will decide which side seems most reasonable.

### **PARENT OF HURT CHILD**

I am the mother of one of the three children in the classroom who have been hurt, either one or more times, by Tommy McBurney. My daughter, Julie Swanson, was bitten on the playground during recess around the end of September. The school nurse called to inform me. When I picked up Julie, she was very upset and talked over and over again about this little boy who was hurting people. She cried and said that she thought God taught us all to be nice to each other. The bite drew blood; I took her to the doctor; and I was given signs to watch for in the event an infection developed. Julie recovered just fine physically, but every day she would come home from school telling another story about what that little Tommy did to her.

I, of course, called the teacher immediately after the bite occurred to find out just what kind of supervision was taking place on the playground. Lisa Hammond explained to me that this was a highly unusual occurrence, that Tommy's parent felt badly about the incident, and that Tommy now understood that this kind of behavior was wrong. However, after Julie kept coming home with more and more stories about Tommy, I decided to ask the teacher for permission to visit the classroom.

On the day I visited the class, I was amazed at what an undisciplined little boy Tommy was. While the other children were quietly doing their worksheets or cutting out pictures for a giant collage, Tommy was talking. He had a hard time sitting still, he kept going to Lisa Hammond for help, and then, even worse, he would bother the other children. As far as I could tell, Tommy

occupied nearly all of Lisa Hammond's time, and the rest of the children in the class were being shortchanged. I met with Lisa Hammond that day after school and learned that an aide would be starting the next day to help in the classroom specifically with Tommy. Lisa explained to me that Tommy has a learning disability and a physical handicap that make it difficult for him to adjust to new children or a new environment. She assured me that the other children were not getting shortchanged, that Tommy's behavior was much improved, and that the aide would be an asset for everyone.

Because this explanation did not satisfy me, and I know enough about first grade to know that these are especially formative years in terms of learning attitudes/behaviors, I decided to take my concerns to the Principal, Lee Schmidt. I let Lee know that I would be watching the situation closely since Julie's emotional and educational well being were my primary concerns.

During October, one of my friends called to tell me that Bobby had huge bruises on his shins from being kicked by Tommy McBurney. After checking with other parents, I discovered more incidents of physical attacks. Julie was not the only child who seemed distressed by Tommy's actions. Armed with this evidence, we decided to meet with Lisa Hammond. We reiterated our concerns and again Lisa assured us that the incidents were becoming less extreme and that the children were really beginning to accept Tommy. We told Lisa that each of us would take a day in the next week to observe the classroom. In each instance we took copious notes. While the aide certainly helped the situation, we believe that the other children deserved more of Lisa Hammond's time and attention. We took our notes and evidence of previous incidents to the Manager. Lee told us that by working together all the children would be able to gain from the experience.

One more incident in which Julie was the target (just a small bruise this time) convinced me that something needed to be done. Therefore, I organized a telephone tree with all the parents of the children in Lisa Hammond's classroom. In these calls, I detailed what had been occurring, told them that I believed that concerted group action would be the only thing that would halt the problem, and asked them to keep their children home from school the next Monday. Most of the parents agreed; I then called the administration and told Lee Schmidt why we were keeping the children home. I told Lee that the whole issue could be solved by putting Tommy in a special home for problem children or trying him out in another classroom since this one was not working well. When Lee refused, I said the children would be kept home. I believe that Lee Schmidt is being too supportive of Lisa Hammond and that it is time for Lee to show some leadership. One of my basic beliefs is that education has to serve the needs of the majority of the children in the classroom. Tommy is only a special case and should not jeopardize the learning environment of 25 other first graders. If Lee doesn't share this view, we will probably keep our children home until the Superintendent resolves the issue.

## **ROLE OF PARENT WHO KEPT CHILDREN HOME**

I am sympathetic to the parents of the children who were hurt in some way by Tommy. They live in the same general neighborhood, and I have known these parents through contacts at church, school events, and other community activities. When Julie's parents called to tell me about what had really been happening in the classroom, I was appalled. While I knew there were some difficulties, I had no idea that the problems were so bad and no idea that things were affecting my child negatively. I knew from my own child that Tommy was a child who often got into trouble in some way in class, but that had seemed no different than new school year adjustments in previous years.

My child had talked about the hitting that had occurred. I naturally was worried and called Lisa Hammond about it. She seemed to be handling it effectively. Since one of my older children had Lisa Hammond as a first grade teacher, I considered myself fortunate to have my youngest child assigned to Lisa's room. Lots of other parents share my views.

While I do not believe that any really terrible incidents have occurred, I am protesting to protect my child and prevent what could happen. What if Tommy suddenly decided that throwing rocks at heads was a good idea and my child was seriously hurt, even permanently? I could never forgive myself if that happened. Therefore, doing something now to make some changes seems like the right thing to do.

I understand that Tommy has been getting better, but that is not the point. Tommy is only one child. What is of more importance...the emotional and physical safety of all the children in the classroom, or the emotional development of just one? I do not believe that it could possibly be healthy for any child to see this disruptive behavior day in and day out. What kind of a model is this for the other children? What will each of them carry forward? What if other children suddenly decide that hitting or biting is good attention-getting behavior, since it works for Tommy?

I believe that Lisa Hammond is behaving irresponsibly and that Lee Schmidt is uninformed. Lisa has obviously been telling Lee what the facts are, and Lee is not forming independent opinions or judgments. Maybe this is serious enough that the Superintendent, Lauren Kearney, should intervene. While I assume that the Superintendent knows about this (word travels quickly in a small town), I cannot believe that Dr. Kearney really approves.

I do not know Susan McBurney personally, but I know that she is a single parent and a reasonable parent for the circumstances. Tommy's behavior probably was caused by his stressful family circumstances and things may still be stressful. When I have seen Tommy with Susan in church, Tommy has been a very well behaved little boy. Apparently Susan is the only one who can really control him. Expecting Lisa Hammond to take Susan's place during the day is unfair to my child and a misuse of public education funds. After all, the district has already had to spend money on an aide that it otherwise would not have needed. This is unfair to the rest of the children at Crestwood Elementary School.

I need to support my friends whose children have been bitten or kicked by Tommy. I intend to stand up and be counted in favor of transferring Tommy or placing him in a special school which

can take better care of his kind. I don't understand Tommy's problems, but I do understand what is best for my child. This issue should be resolved quickly so my child can return to school. He wanted to go Monday and did not understand why all the older children got on the bus that morning.

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# Recommended Reading and Resources

[Business Writer's Free Library](http://www.managementhelp.org/commskls/cmm_writ.htm). General Recommendations to Improve Communications Skills: [www.managementhelp.org/commskls/cmm\\_writ.htm](http://www.managementhelp.org/commskls/cmm_writ.htm) - 12k.

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# Acknowledgments

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Bob Sickles	Editor for <i>Eye on Education</i> (Provided permission to use material reprinted in this module from the Written Expression Workbook)
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